PEOPLECLICK USER GUIDE

HIRING LEADS

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HIRING LEADS

ACCESSING PEOPLECLICK

BASIC PEOPLECLICK FUNCTIONS

MANAGING CANDIDATES

PEOPLECLICK WORKFLOW

APPENDIX

ACCESSING PEOPLECLICK

The Peopleclick Recruiting Portal is the University of Calgary's recruitment management system. This system enables us to manage our postings, applicants and approval processes. Peopleclick is a web-based application. While you do not need to install any Peopleclick software on your computer to use the Recruiting Portal, you do need to install an approved version of the **Microsoft Internet Explorer** browser (version 7 or 8) and configure it correctly in order to use all of the functions of the Recruiting Portal.

TIPS FOR USERS OF NON-INTERNET EXPLORER BROWSERS

- If you are a PC user and have selected a different browser as your default (e.g., Firefox), you can access Peopleclick by opening Internet Explorer from your desktop and going to https://home.peopleclick.com. If Internet Explorer 7 or 8 is not installed on your PC, you can download it from http://microsoft.com.

- MAC users have the option of accessing the **U of C Virtual Desktop** which will allow you to use Internet Explorer on your computer. For instructions, please visit the HR website.
Note: You must be on campus to access the Virtual Desktop

- If you are a Linux or Sun Microsystems user, there are alternatives:

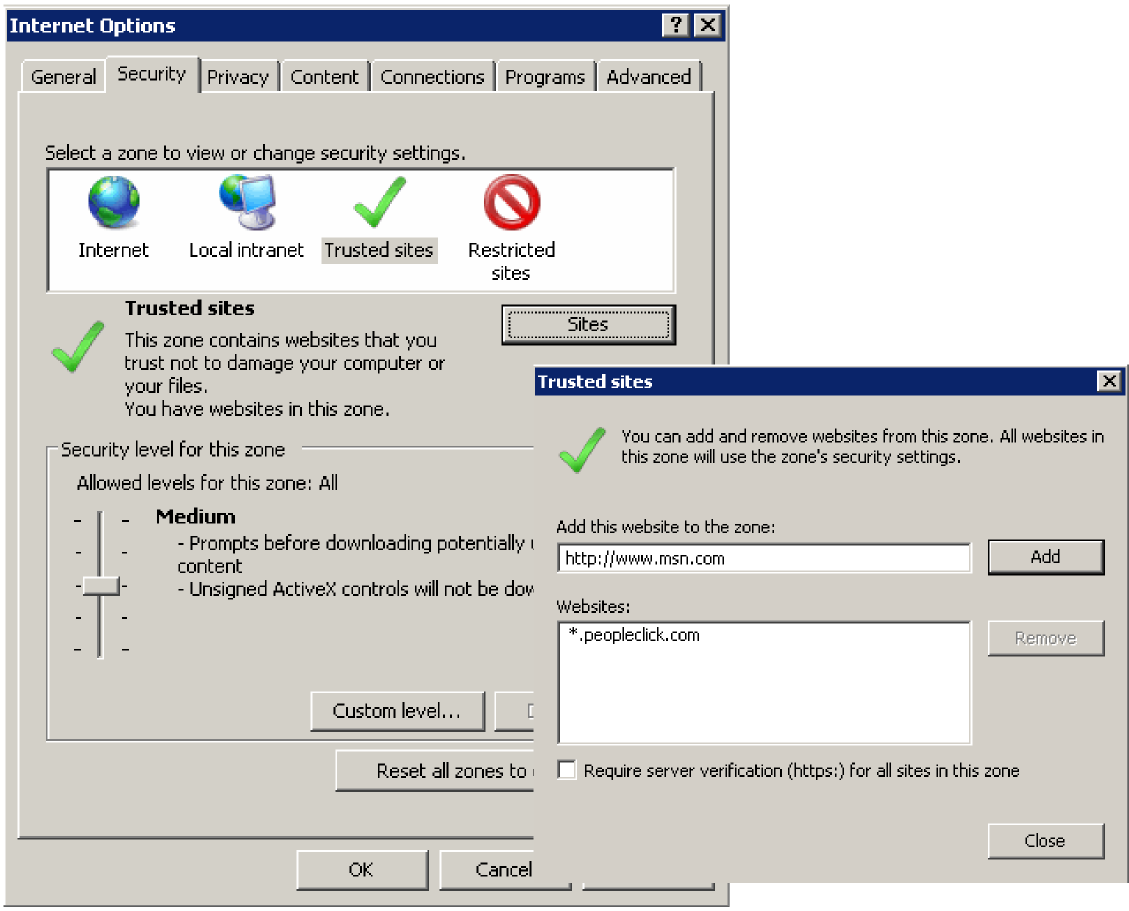
  a. Contact the Recruitment Team (hrhire@ucalgary.ca) and request that applications be emailed to you directly
  b. Contact the Recruitment Team (hrhire@ucalgary.ca) and request to have a colleague / administrator added as a hiring manager in Peopleclick so that they can access applications and action candidates on your behalf
  c. There are often labs and /or PCs available for use by students/staff. Inquire in your department/unit as to where you may be able to access a PC.

Configure Internet Explorer

Once you have successfully downloaded Internet Explorer (if necessary), you must configure certain settings to ensure proper functions are available.

1. Open Internet Explorer
2. On the **Tools** menu, select **Internet Options**

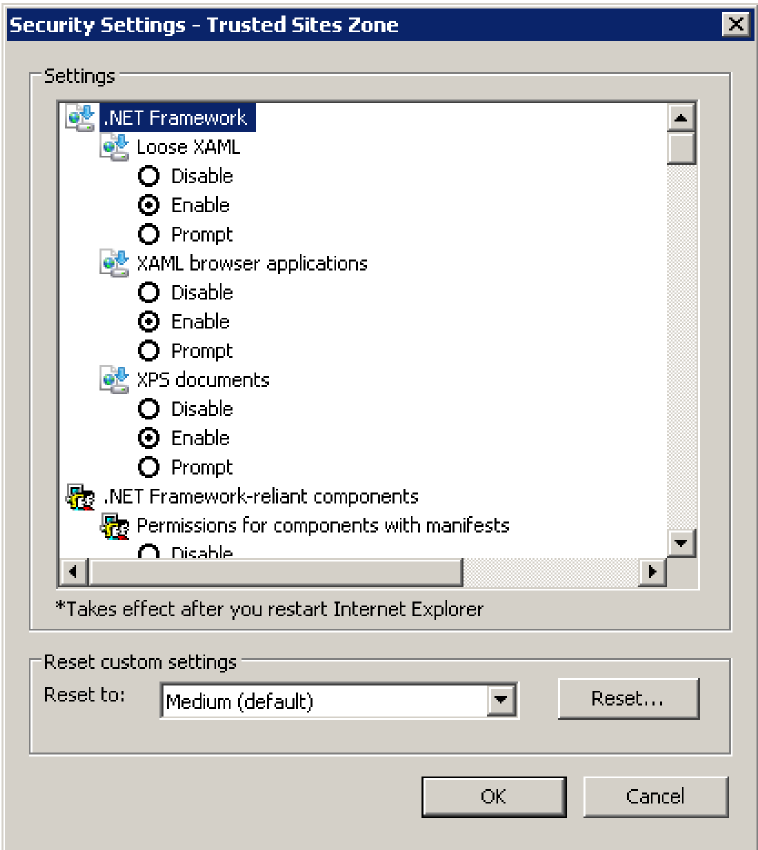
Set Trusted Sites:



3. Click the **Security** tab at the top of the Internet Options dialog box
4. Click the **Trusted Sites** icon
5. Click the **Sites** button
6. Unselect the **Require server verification (https:) for all sites in this zone** check box
7. Type ***.peopleclick.com** in the **Add this Web site to the zone** field and click the **Add** button
8. Click **Close** to return to the Security tab

Configure Internet Explorer (continued)

Set Security Settings:

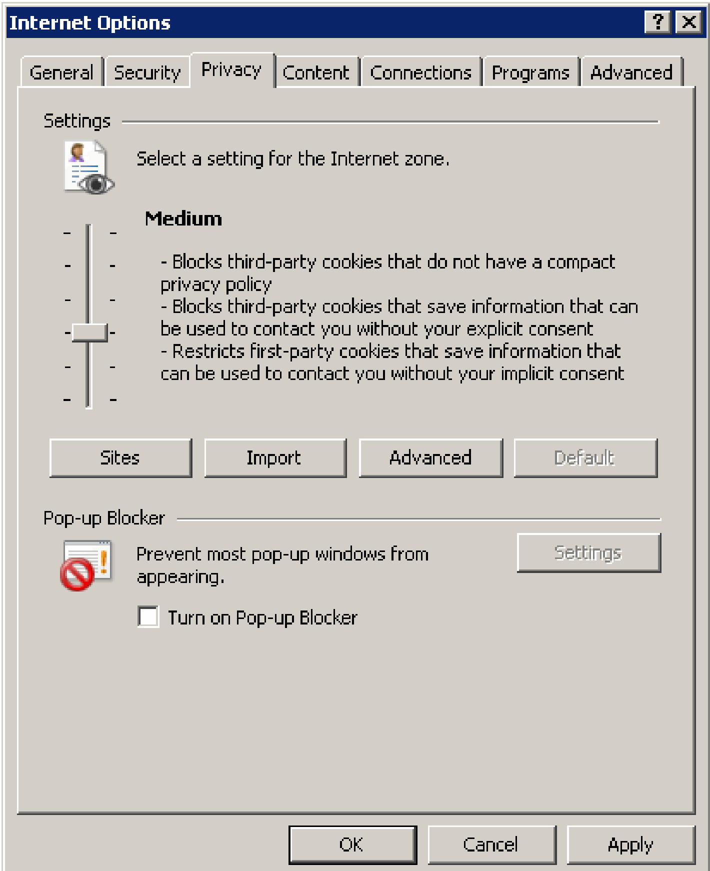


1. On the Security tab, click the **Custom level** button
2. Use the information in the table below to set the Security Settings that impact the Peopleclick RMS Recruiting Portal
3. Click **OK** to apply and save your changes

Setting Name	Required Value
Active X controls and plug-ins	
Run signed ActiveX controls	Enable
Script ActiveX controls marked safe for scripting	Enable
Downloads	
File Download	Enable (Required to view candidate and requisition attachments that are not viewed natively within the browser window.)
Miscellaneous	
Submit non-encrypted form data	Enable. (Required to support the Candidate Portal if not using HTTPS.)
Scripting	
Active Scripting	Enable. (Required to support the Candidate Portal and Business Intelligence Platform.)

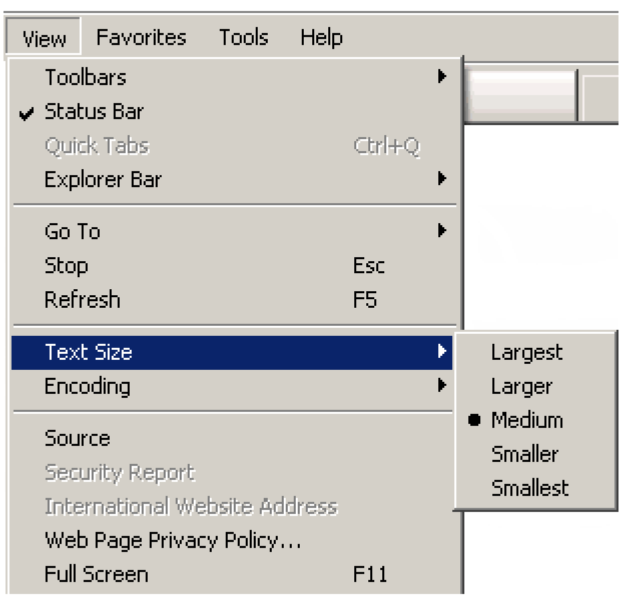
Configure Internet Explorer (continued)

Set Privacy Settings:



1. Click the **Privacy** tab
2. Use the slider to set the privacy setting to **Medium**
3. Click **OK**.

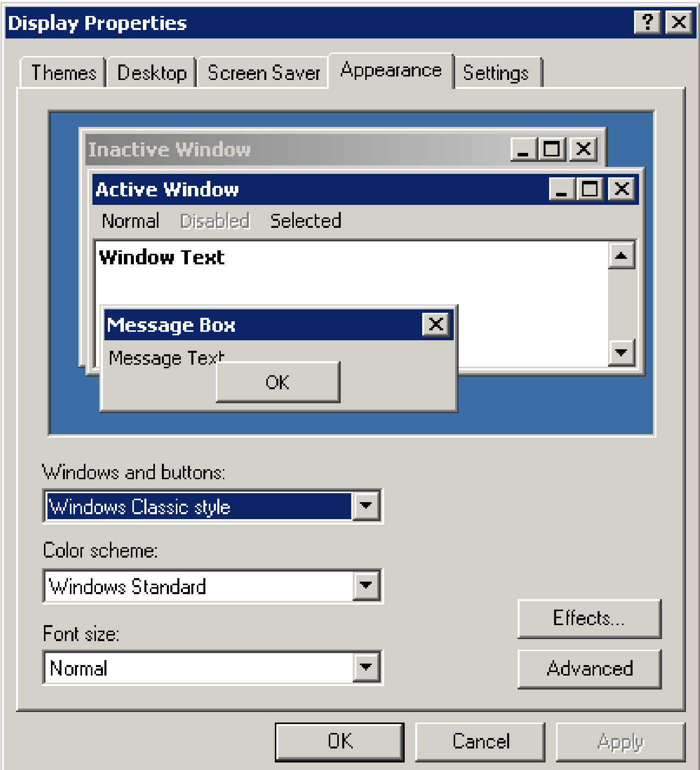
Set Text Size:



1. On the **View** menu, click **Text Size**
2. Select **Medium**, **Smaller**, or **Smallest**

CONFIGURE DESKTOP SETTINGS

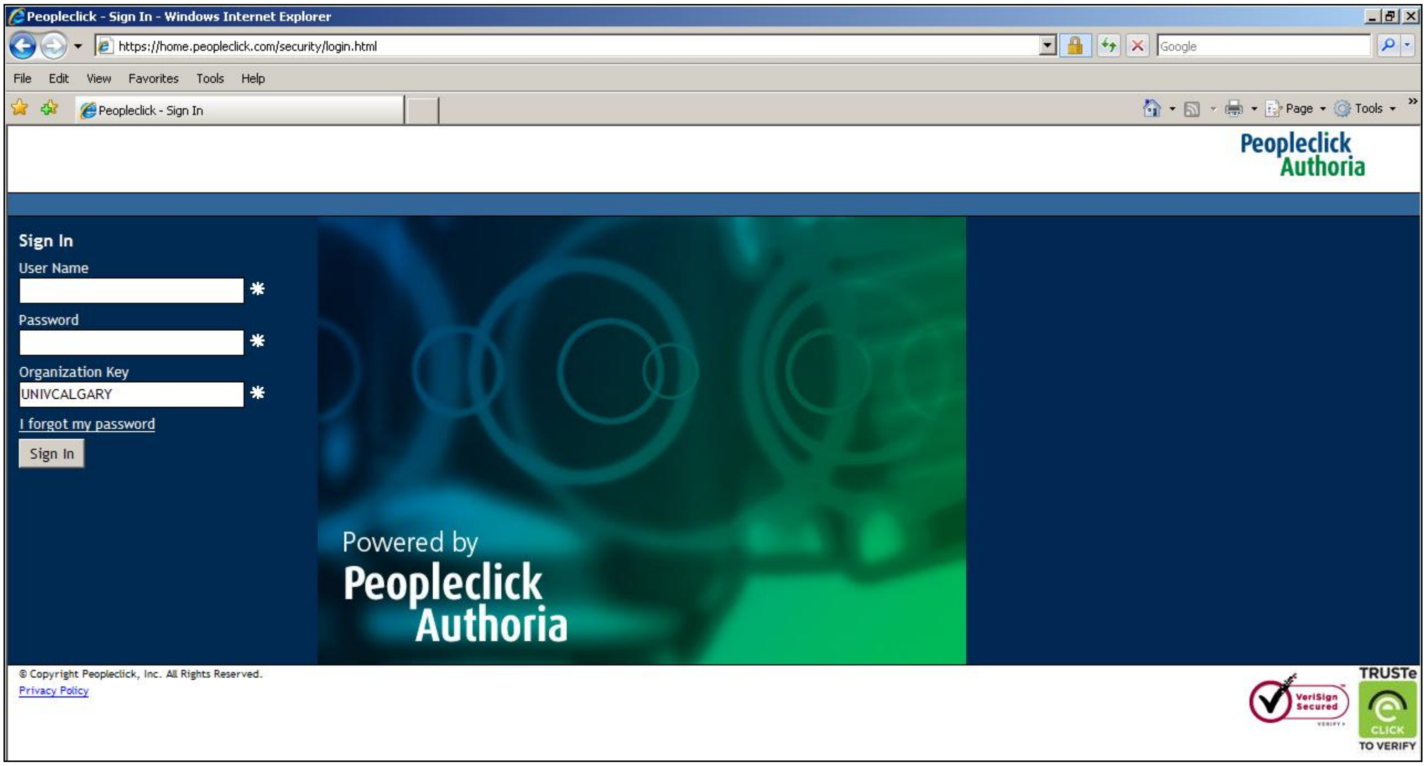
The Peopleclick RMS Recruiting Portal is best viewed when specific display settings are selected:



1. Right-click in your Windows Desktop
2. Select **Properties** from the pop-up menu
3. Click the **Appearance** tab
4. Select **Normal** in the **Font size** field
5. Click the **Settings** tab
6. Move the slider to set the display size to 1024 X 768
7. Click the **Advanced** button
8. On the **General** tab, select **Normal (96 DPI)** in the DPI Setting field and then click **OK**
9. Click **OK**.

Basic Peopleclick Functions

Sign In to Peopleclick



Steps

In Internet Explorer (version 7 or 8), enter the URL:
https://home.peopleclick.com/

Enter your username, password and organization key (**UNIVCALGARY**).

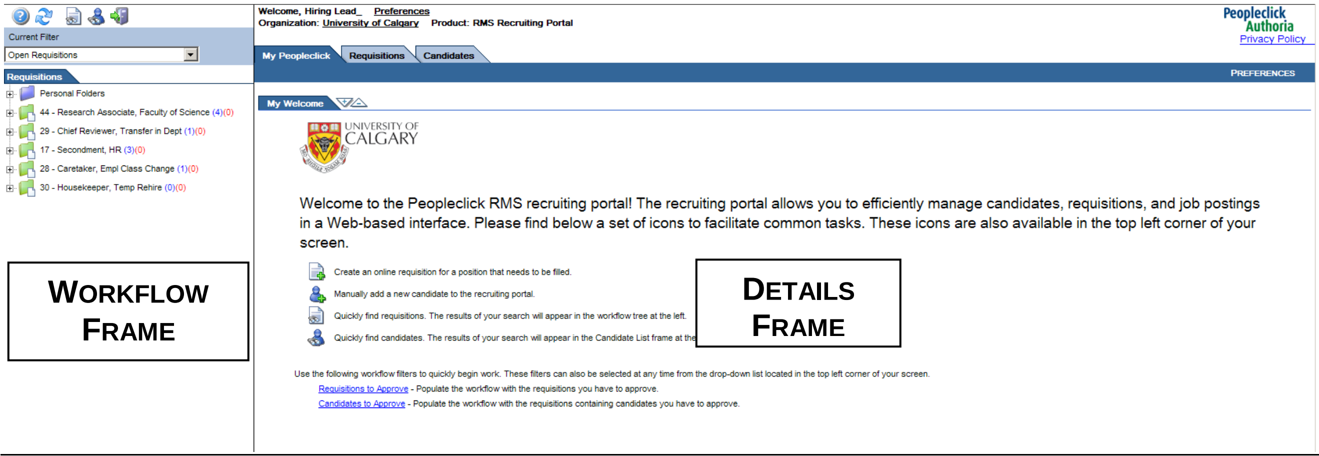
Your username and password will be provided to you by the Recruitment Team.

If you are having problems logging in, please contact hrhire@ucalgary.ca.

Navigating the Recruiting Portal

Identify Screen Elements in the Recruiting Portal

Peopleclick has been designed to make your work easier and more efficient. The Recruiting Portal window is divided into two primary frames: the **Workflow** frame, located on the left, and the **Details** frame, located on the right.



Workflow Frame

The Workflow frame displays your existing requisitions (job openings) in a folder format. These **requisition** folders contain detailed information about each requisition. Within each requisition folder, a series of **workflow** folders help move candidates through the hiring process.

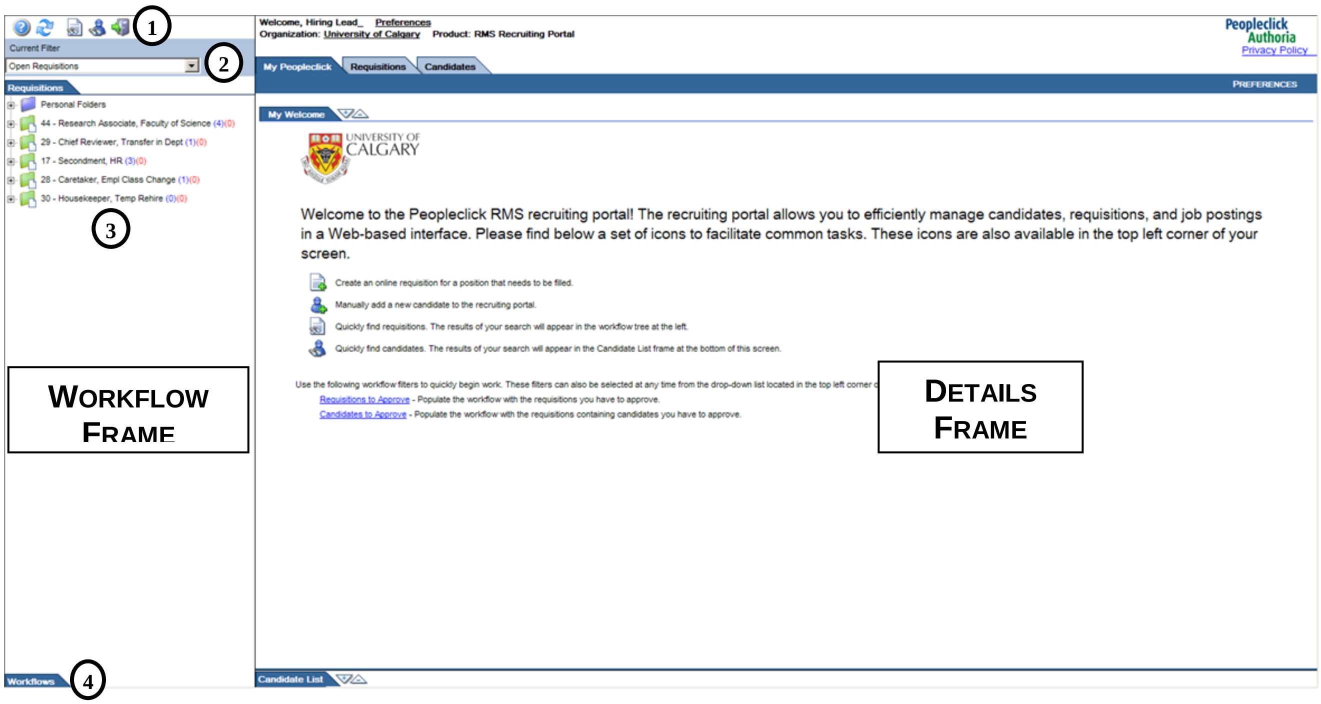
Candidates appear in the Sent to Manager folder and can be moved through the workflow folders as they are evaluated and a hiring decision is made.

Details Frame

The Details frame displays the information needed to view and maintain detailed information about requisitions and candidates.

The Details frame displays three main tabs at the top of the frame. Page labels are located directly beneath the main tabs, and information panels are displayed within these pages. Use the tabs, pages, and panels of the Details frame to complete your day-to-day recruiting functions.

Recruiting Portal Screen Elements



Workflow Frame. The left side of the window displays requisitions (job openings). Each requisition contains a set of folders that represent the hiring process. Candidates are moved from folder to folder as they move through the hiring process.

1. **Global Icons Toolbar.** The Global toolbar is visible regardless of which main tab is selected in the Details Frame.

2. **Requisition Filter.** Requisition filters are used to manage the list of requisitions that is displayed in the Workflow frame. For example, you can use filters to display only requisitions that you need to approve (*Requisitions to Approve*), or only those requisitions that fall under a specific status (*Open / Pending / On Hold*).

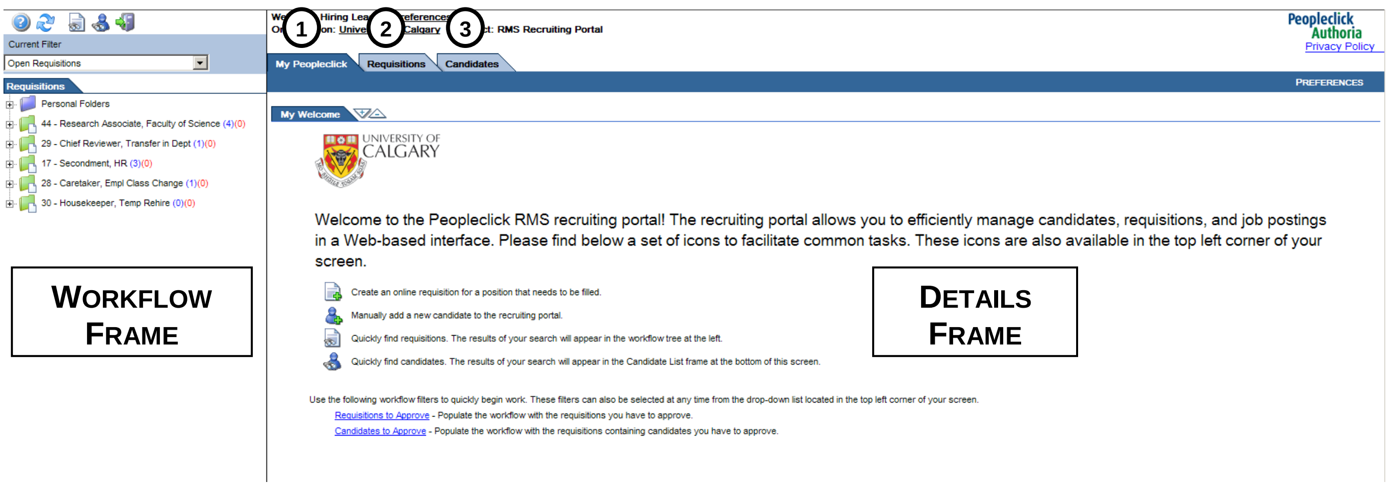
3. **Requisitions View.** The requisitions view displays workflow folders within each requisition. The currently selected requisition filter determines which requisitions are shown. To display the requisitions view, click the **Requisitions** tab in the Workflow frame.

4. **Workflows View.** The workflows view displays all the candidates who are in each workflow folder, regardless of the requisition they are assigned to. For example, if you want to review a complete list of candidates you need to interview, click the **Workflows** tab and then click the Interviews folder. The total number of candidates displayed is determined by the currently selected requisition filter and the number of requisitions you have permission to view.

Recruiting Portal Screen Elements (continued)

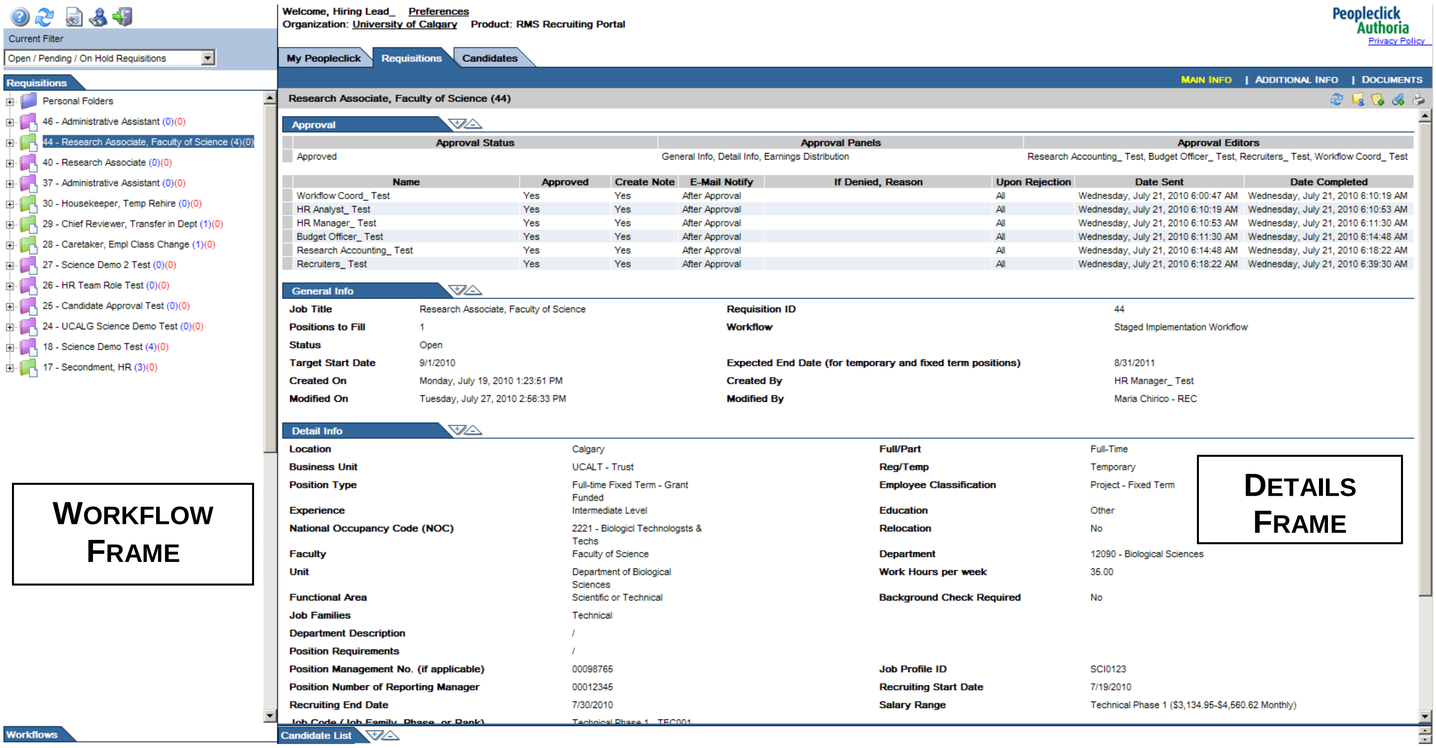
Details Frame. The right side of the window displays the Recruiting Portal three main tabs:

1. The **My Peopleclick** tab is used to configure the Recruiting Portal so you can easily access the items you need in your daily job duties, such as viewing requisition, candidate, and job posting summaries.
2. The **Requisitions** tab is used to view information about your current requisitions and add, view, and delete notes and attachments associated with requisitions. Click on a job title in the Workflow frame to view the requisition in the Details Frame.
3. The **Candidates** tab is used to view and modify information about current candidates and add notes and attachments to a candidate's profile. Click on the Candidates name to view the Candidate in the Details Frame.



View a Requisition

To view a requisition, simply click on the title of the position in the Workflow frame. The details for that requisition will appear on the right hand side of the screen in the Details frame.



Requisition ID and Title

New requisitions display in **bold** for the first 24 hours.

- The **blue** number designates the total number of candidates in the requisition.
- The **red** number designates the number candidates who are new to the requisition within the last 24 hours.

Requisition Status

Folder colours change when the status of the requisition changes. The status can be changed one of two ways, either automatically by the system or manually by a Recruiter.

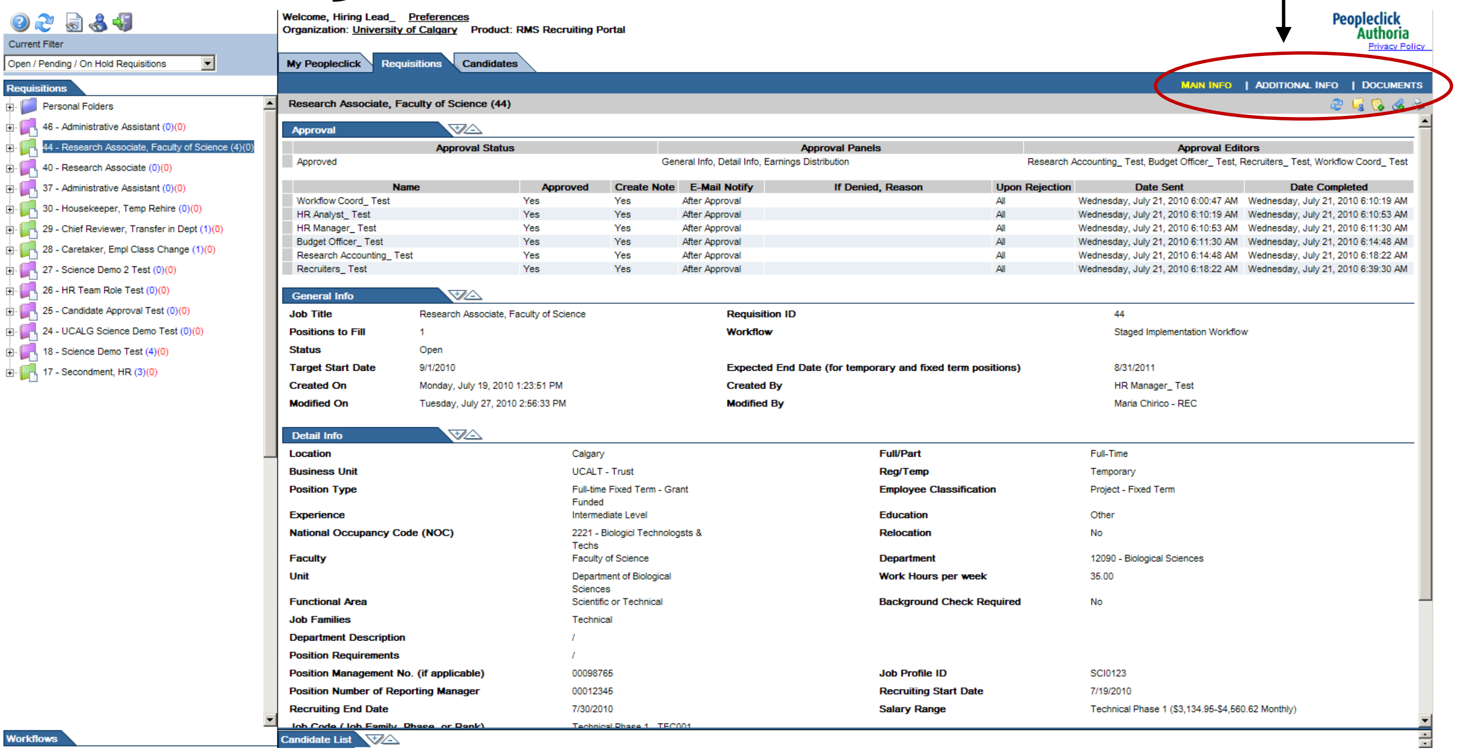
Requisition Status Categories

 (green)	**Open**
 (green with blue thumb tack)	**Open** and posted on the U of C Careers website
 (purple)	**Pending** (awaiting approval)
 (yellow)	**Closed**
 (blue)	**Filled**
 (orange)	**Cancelled**
 (red)	**Denied** (rejected / sent back for corrections)

View a Requisition (Continued)

Requisition information is divided into three separate pages:

- **Main Info**
- **Additional Info**
- **Documents**

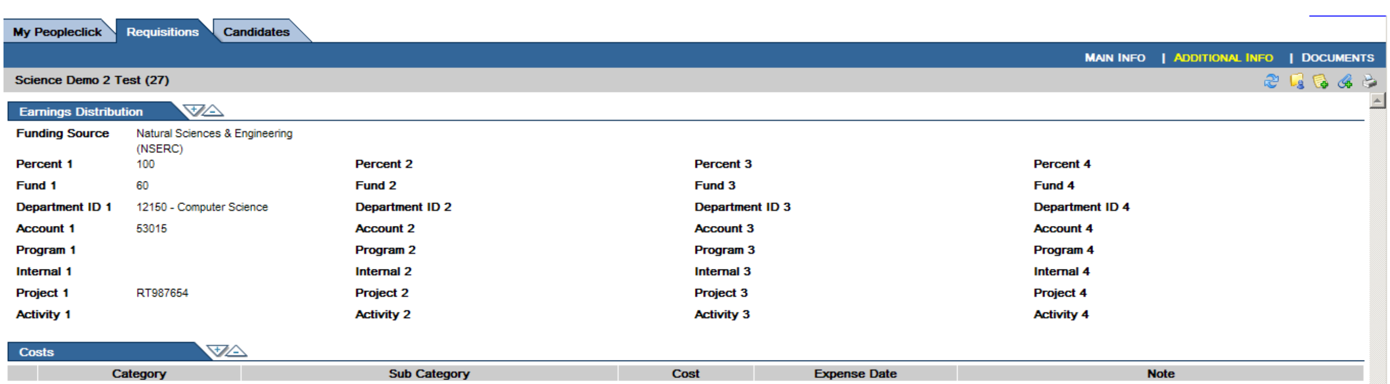


The **Main Info** page includes the following information:

- **Approval** - Lists the individuals in the approval workflow and shows date/time stamp
- **General Info** - Includes the position title, number of positions and expected start and end dates
- **Detail Info** - Includes all position details including position type, faculty/department, work hours, job code, position description, etc.
- **Contacts** - Lists the contacts connected to the requisitions (i.e. those individuals who have access to view the requisition and the associated candidates)

The **Additional Info** page includes the following:

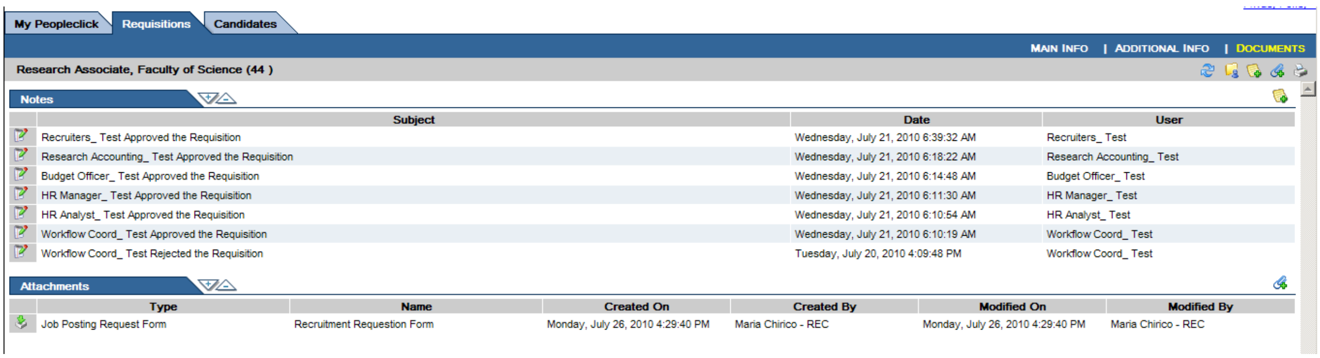
- **Earnings Distribution** - Breakdown of accounting chartfields the position will be charged to
- **Costs** - Any additional costs associated with the requisition (i.e. advertising costs)



VIEW A REQUISITION (CONTINUED)

The **Documents** page includes:

- **Notes** - Any information relevant to the requisition.
- **Attachments** – Any documents connected to this requisition (i.e. Recruitment Request Form)



To view a note, click on the to the left of the note

To view an attachment, hold down the 'Ctrl' key and click on the next to the document.

To Add a Note

1. Click the **Add New Note** ( ) icon
2. Enter a subject for the note
3. Click the **Public Note** check box to make the note public (viewable by all RMS users with access to the requisition). If unchecked, it is private and viewable only by you
4. Click **Create**

To Edit a Note You Have Created

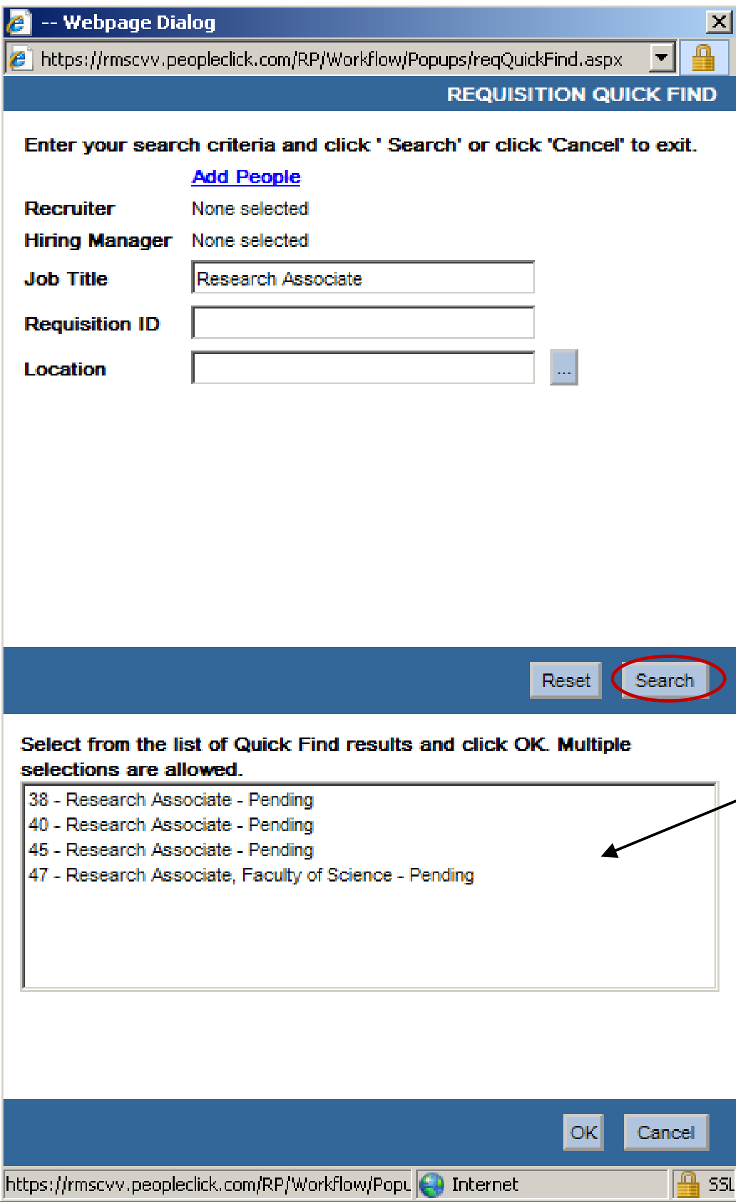
1. Click the **Edit** ( ) icon
2. Make changes to the note
3. Click the **Update** button to save changes to the note

To Add an Attachment

1. Click the **Add/Replace Attachment** ( ) icon
2. Enter a New File Description
3. Choose an Attachment Type
4. Enter the File name or click **Browse** to search for it
5. Click **Upload File**

SEARCH FOR A REQUISITION

Use **Find Requisition** ( ) icon to search for a specific requisition.

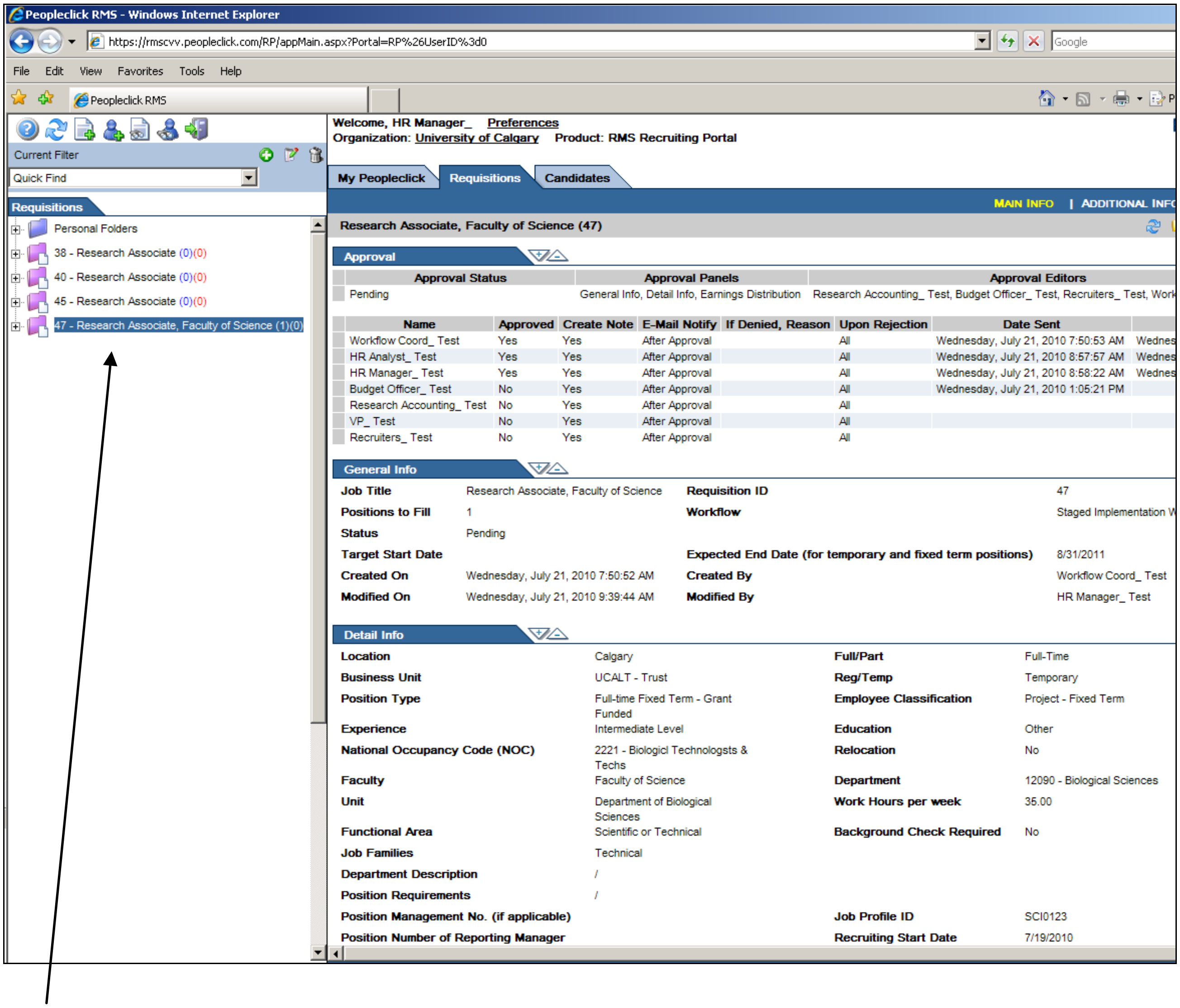


A search box will appear and you can search by Job Title, Requisition ID or Recruiter/Hiring Manager.

After entering search criteria, click Search.

Matches display in the box below. Select one or more requisitions from the list and click OK (more than one selection can be made using the 'Ctrl' key).

SEARCH FOR A REQUISITION (CONTINUED)

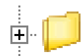


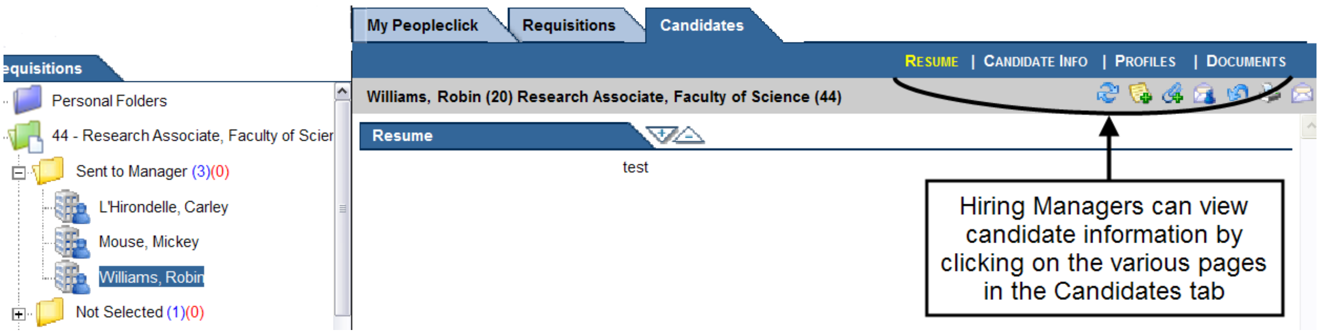
Selected requisitions will appear in the Workflow Frame.

Managing Candidates

View Candidate Information

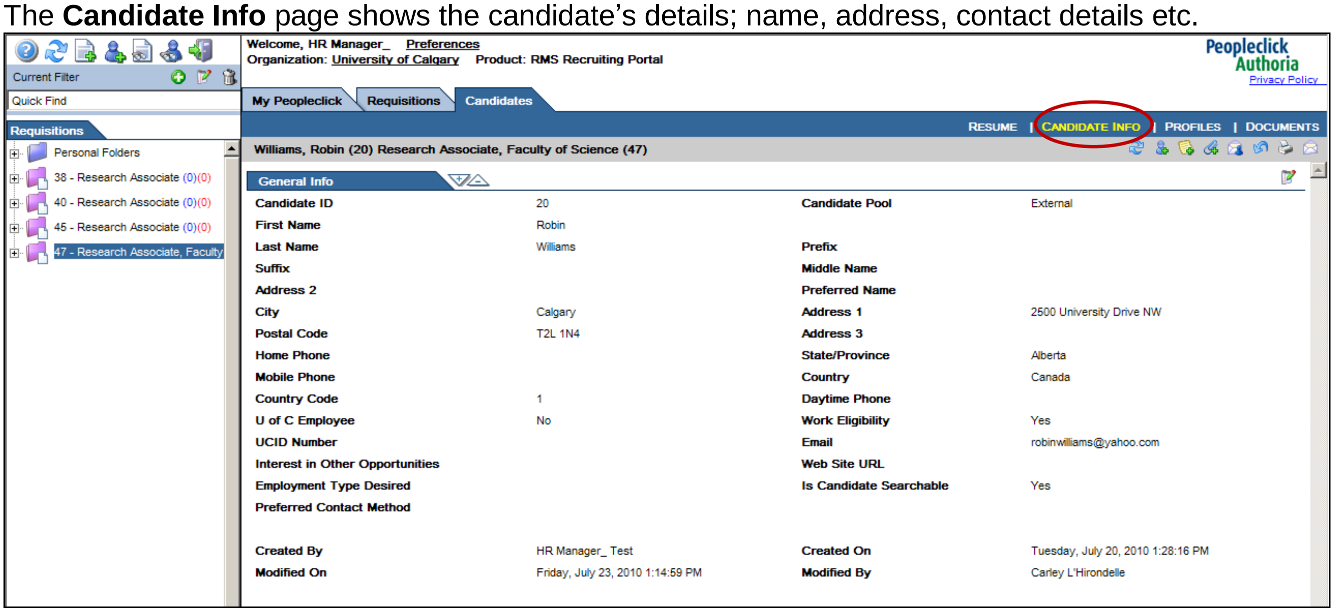
To view the candidates under a requisition, go to the Workflow frame.

1. Click the (+) to the left of the requisition.  The numbers next to the folder name indicate how many candidates are in each folder.
    - The **blue** number designates the total number of candidates in the folder
    - The **red** number designates the number candidates who are new to the folder within the last 24 hours.
2. Click the (+) to the left of the workflow folder 
3. Click the candidate's name to display their information in the details frame.



The **Resume** page shows the candidate's cover letter and resume.

The **Candidate Info** page shows the candidate's details; name, address, contact details etc.



The **Profiles** page shows the offer information entered via the "Offer Accepted" trigger (see pg. 32), and thus would only show information for the person hired into the position.

View Candidate Information (Continued)

The **Documents** page shows any attachment relevant to the candidate.

- **Notes** – can include AUPE service date and interview notes
- **Attachments** – includes documents the candidate submitted, such as reference letters and their resume (if they chose to attach it rather than paste it in.

To view a note, simply click on the to the left of the note

To view an attachment, hold down the 'Ctrl' key and click on the next to the document.

To Add a Note

- Click the **Add New Note** () icon
- Enter a subject for the note
- Click the **Public Note** check box to make the note public (viewable by all RMS users with access to the requisition). If unchecked, it is private and viewable only by you
- Click **Create**

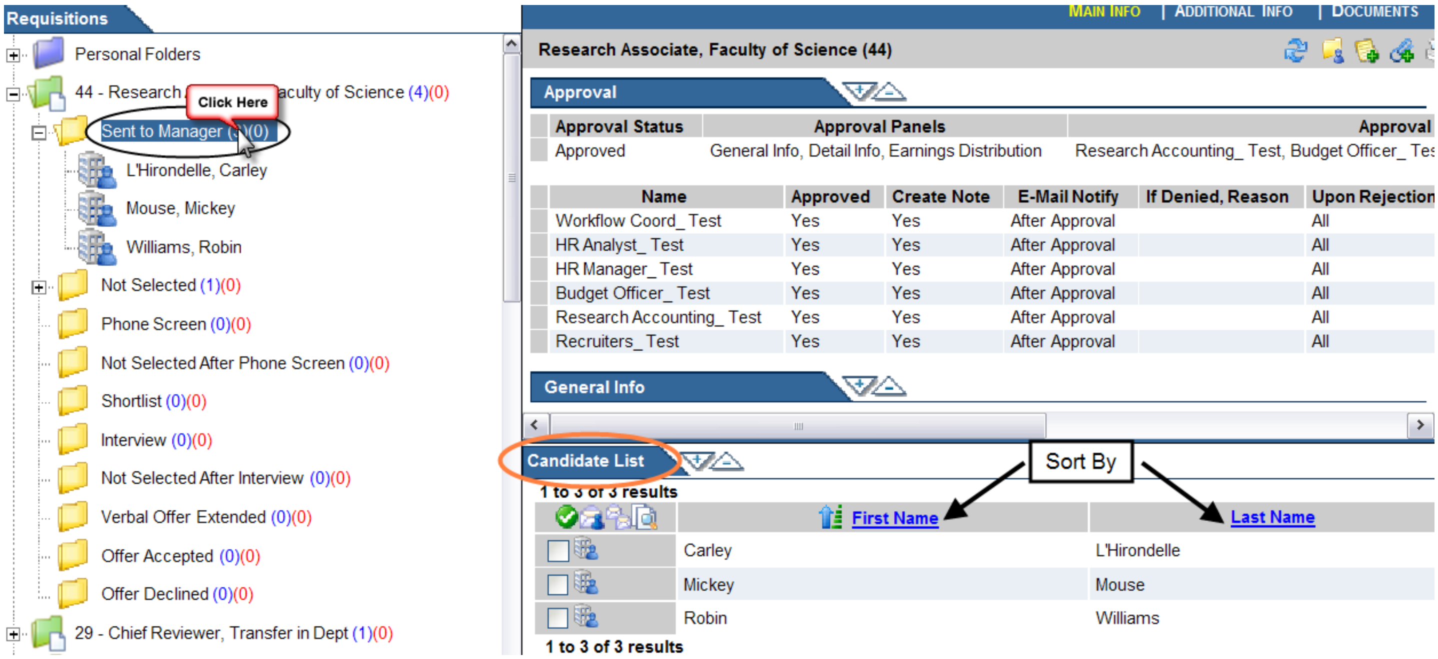
To Edit a Note You Have Created

- Click the **Edit** () icon
- Make changes to the note
- Click the **Update** button to save changes to the note

To Add an Attachment

- Click the **Add/Replace Attachment** () icon
- Enter a New File Description
- Choose an Attachment Type
- Enter the File name or click **Browse** to search for it
- Click **Upload File**

USE CANDIDATE LIST TO MANAGE CANDIDATES



1. Click once on the appropriate folder name (i.e. 'Sent to Manager') and the candidates in that folder will appear in your Candidate List.

2. You can sort the candidate list by first or last name by clicking on the appropriate column.

3. **To email candidates**, you can either click the check box beside the candidate(s), or click the green check ( ) to select all candidates (click a second time to un-check). Then click the Email Candidates ( ) Icon and an email will pop up with the candidate(s) email address populated.

4. **To email candidate resume(s)**, select one or more candidates and click the Email Selected Resume/ CVs ( ) icon, and an email will pop up with the resume(s) attached.

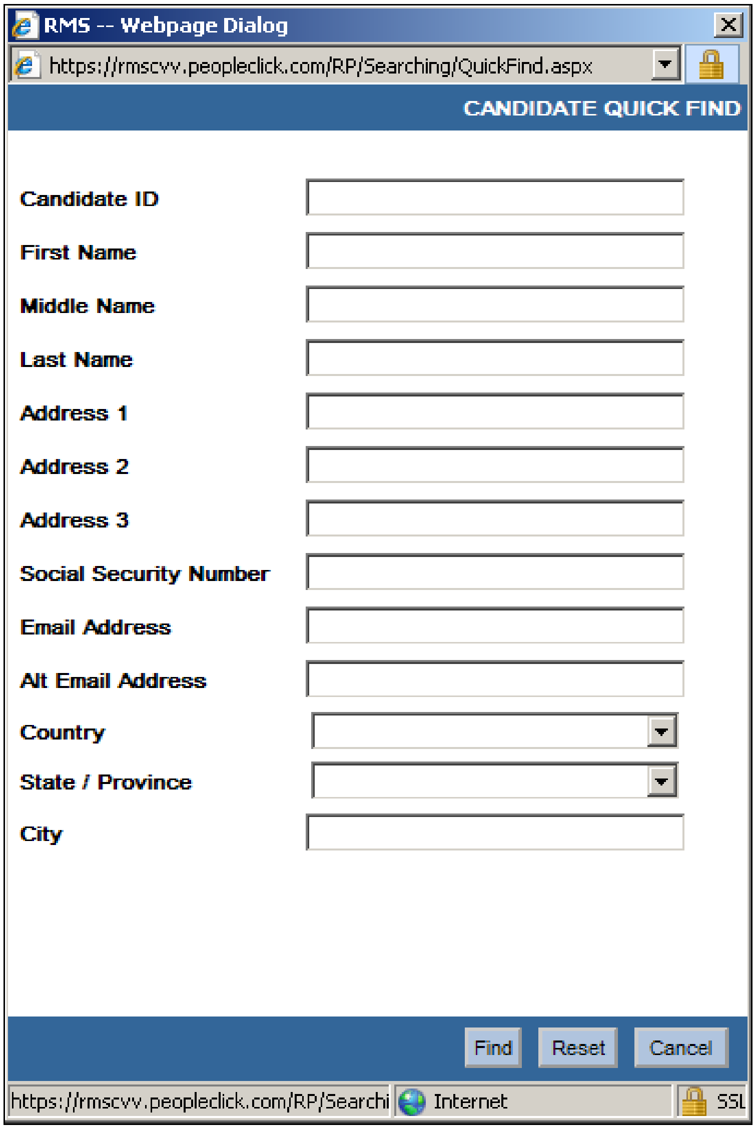
5. **To print candidate resume(s)**, select the candidate(s) you would like, then click the Preview and Print Selected Resume/CVs ( ) icon. A preview screen will pop up with the option to print.

6. **To move multiple candidates through folders,** select the candidates you would like to move (with individual check boxes or the 'select all'), then drag (the candidate icons) and drop into the appropriate folder.

- **At any time you can view all candidates in a requisition by clicking on in the top right corner of the Requisitions tab.**

SEARCH FOR A CANDIDATE

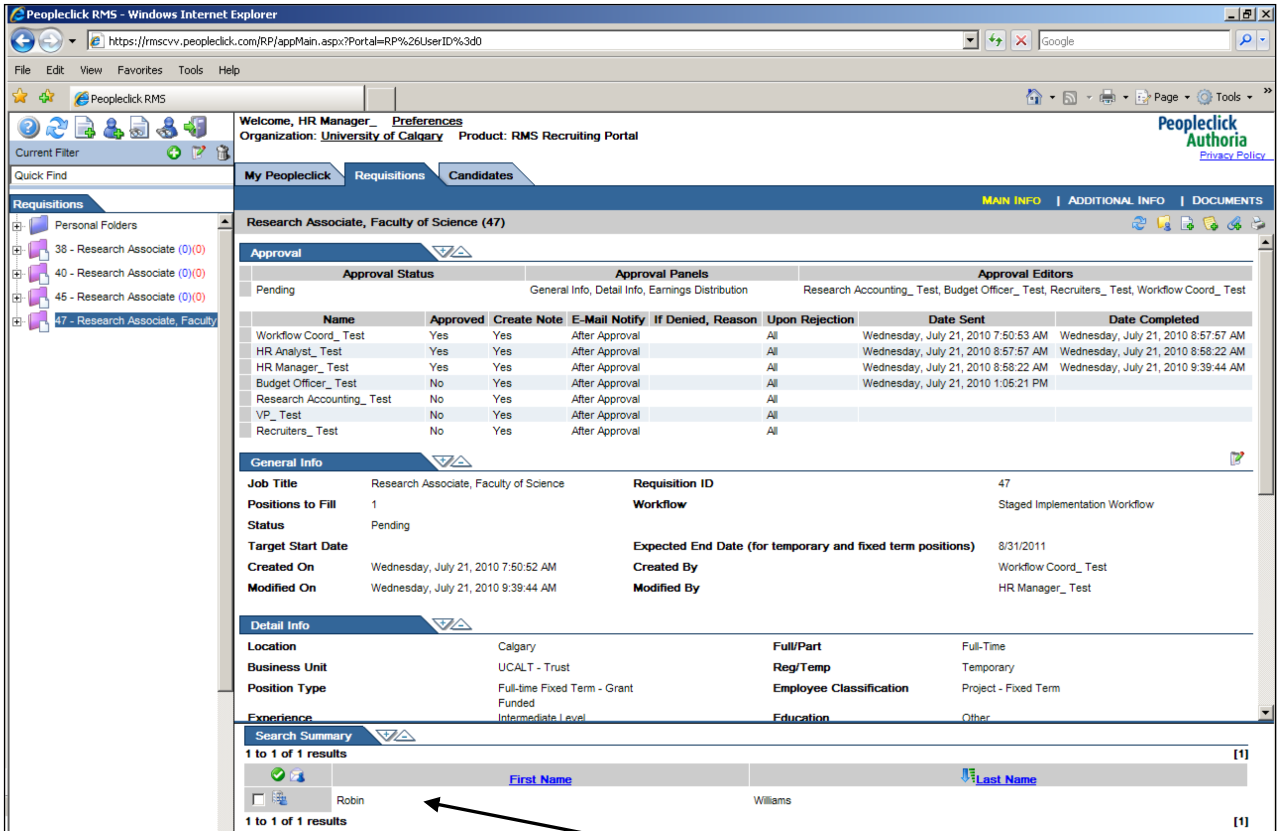
Use the **Candidate Quick Find** ( ) icon to search for a specific candidate.



A search box will appear giving you several search options. Name and email searches will be the most common (and will give the best results).

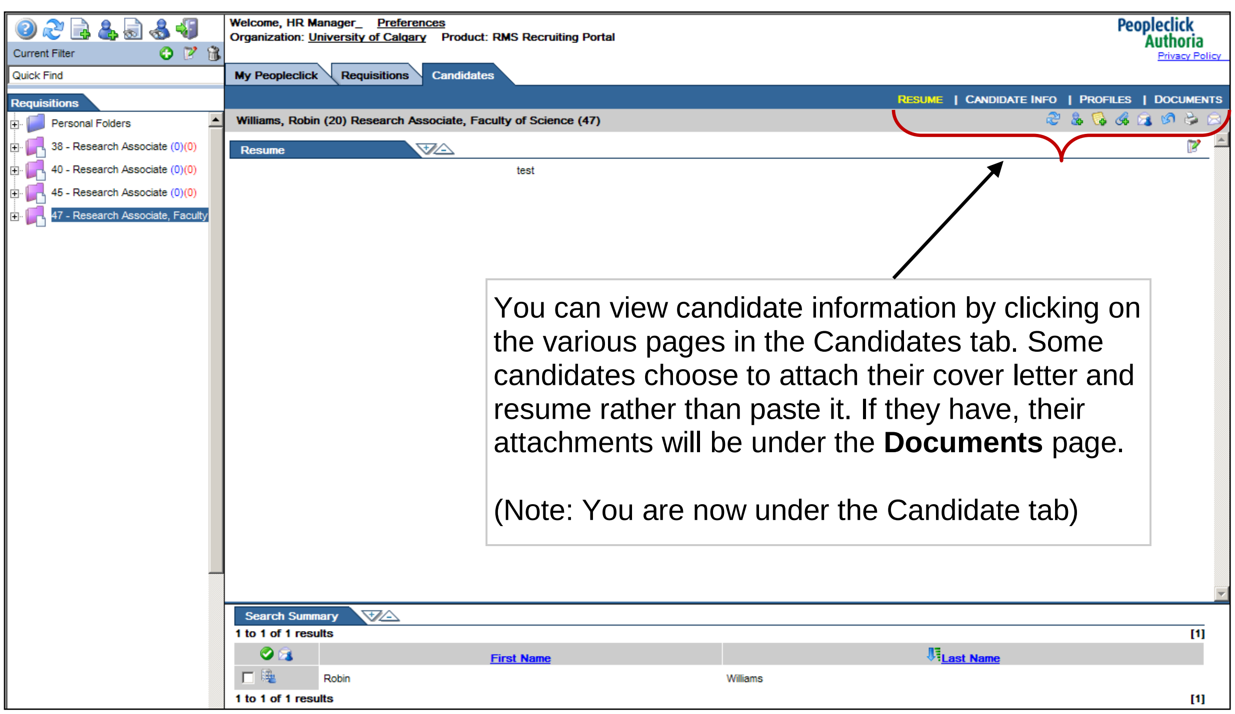
After entering search criteria, click Find.

SEARCH FOR A CANDIDATE (CONTINUED)



Search results will appear under the **Search Summary** tab.

Click on a name and the candidate's information will appear as shown below.



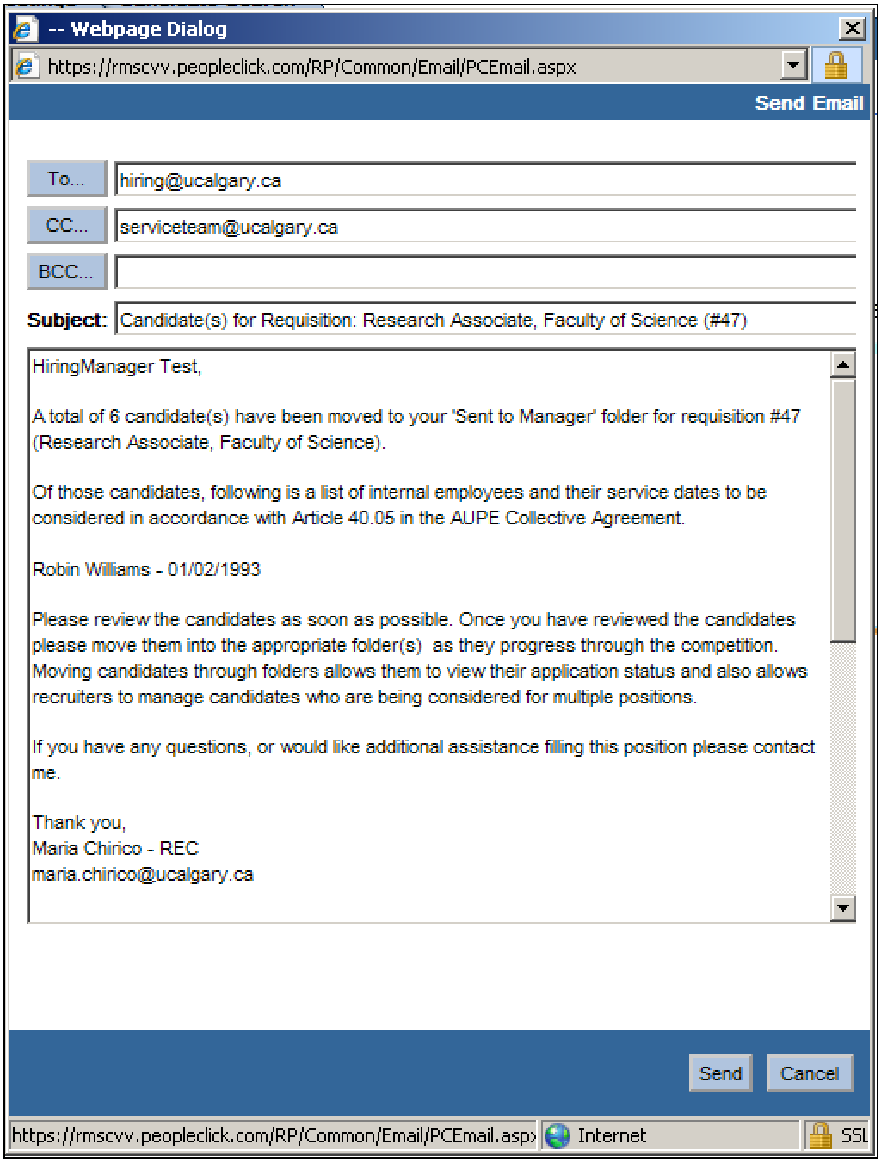
You can view candidate information by clicking on the various pages in the Candidates tab. Some candidates choose to attach their cover letter and resume rather than paste it. If they have, their attachments will be under the **Documents** page.

(Note: You are now under the Candidate tab)

PEOPLECLICK WORKFLOW

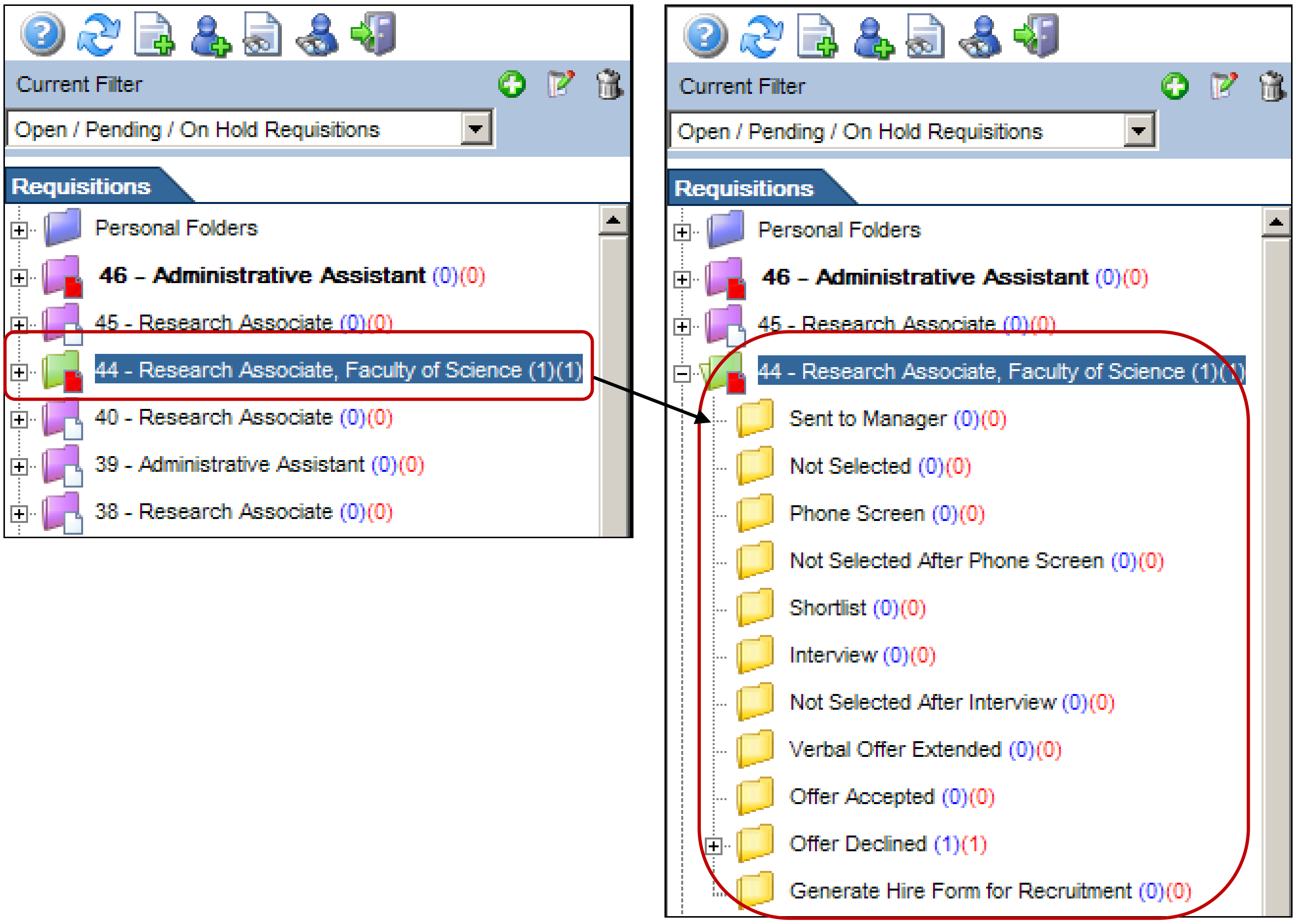
MANAGING THE WORKFLOW ~ MOVING CANDIDATES THROUGH THE WORKFLOW

Once all approvals have been obtained and the position has been posted and closed, the following email will be sent to the Hiring Lead and HR Service Team to notify them of the total number of candidates that have applied for the position and highlighting internal candidates with their service date (as per Article 40.05 in the AUPE Collective Agreement).



MANAGING THE WORKFLOW ~ MOVING CANDIDATES THROUGH THE WORKFLOW (CONTINUED)

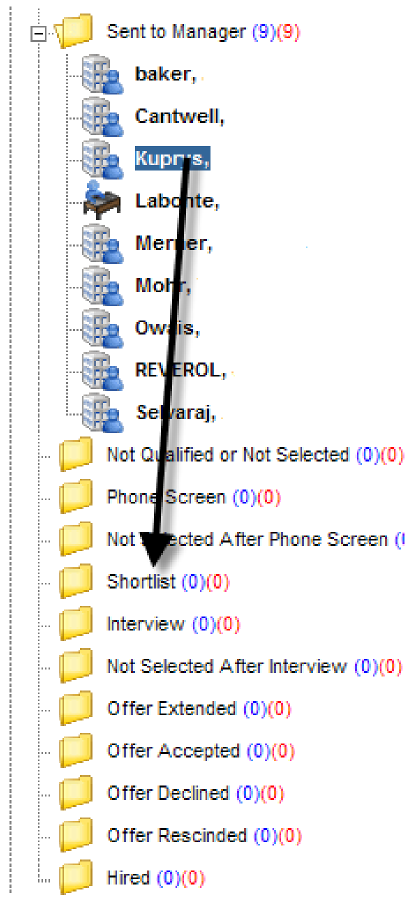
As candidates progress through the hiring process, you will move them through the corresponding folders in the Workflow frame.



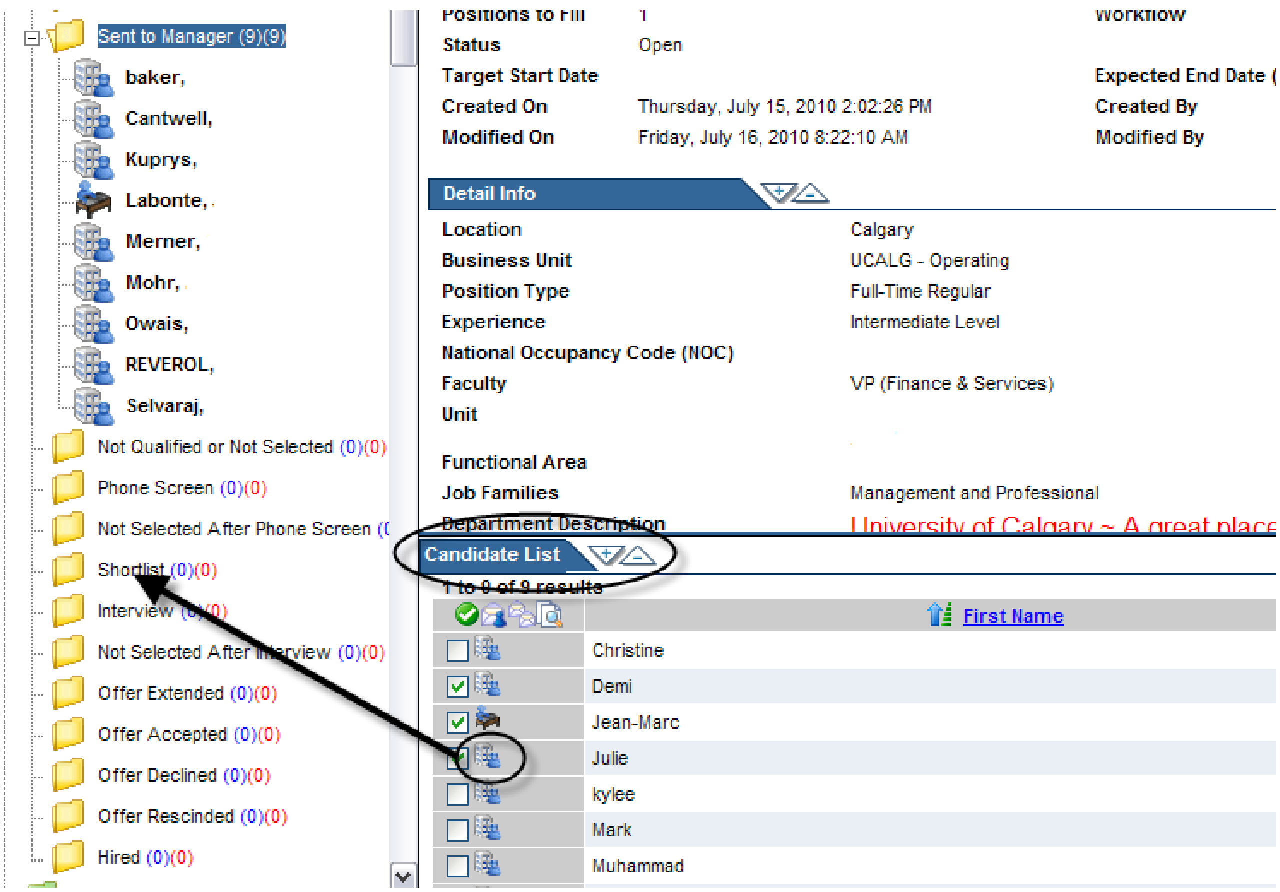
To display the workflow folders within a requisition, click the **+** sign next to the requisition name. Each workflow folder represents a step in the hiring workflow.

Managing the Workflow ~ Moving Candidates through the Workflow (Continued)

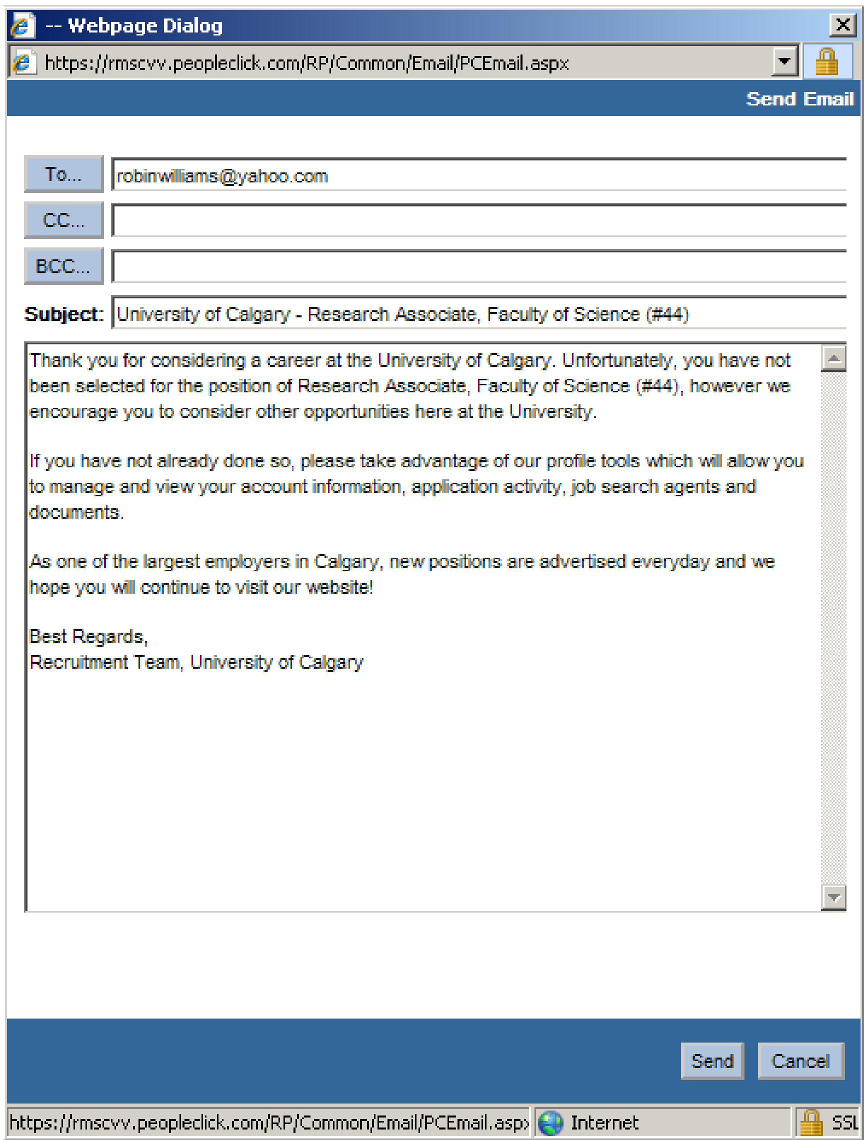
How to move candidates within the Workflow folders: Option 1	
Step	**Description**
1	Click on the name of the candidate to view their resume and candidate information
2	Click on the name of the candidate and holding down the left mouse button, drag the candidate down to the folder where you want to move the candidate
3	The candidate's name is displayed under the new folder name



How to move candidates within the Workflow folders: Option 2	
Step	**Description**
1	Click the Workflow folder title that you want to move candidates from and display the candidate list
2	In the Candidate List, put a check mark next to the candidate(s) you want to move
3	Click the or icon next to the first candidate you selected, and drag the candidates into the desired workflow folder. All selected candidates should move into the desired workflow folder.



Workflow Folders and Triggers

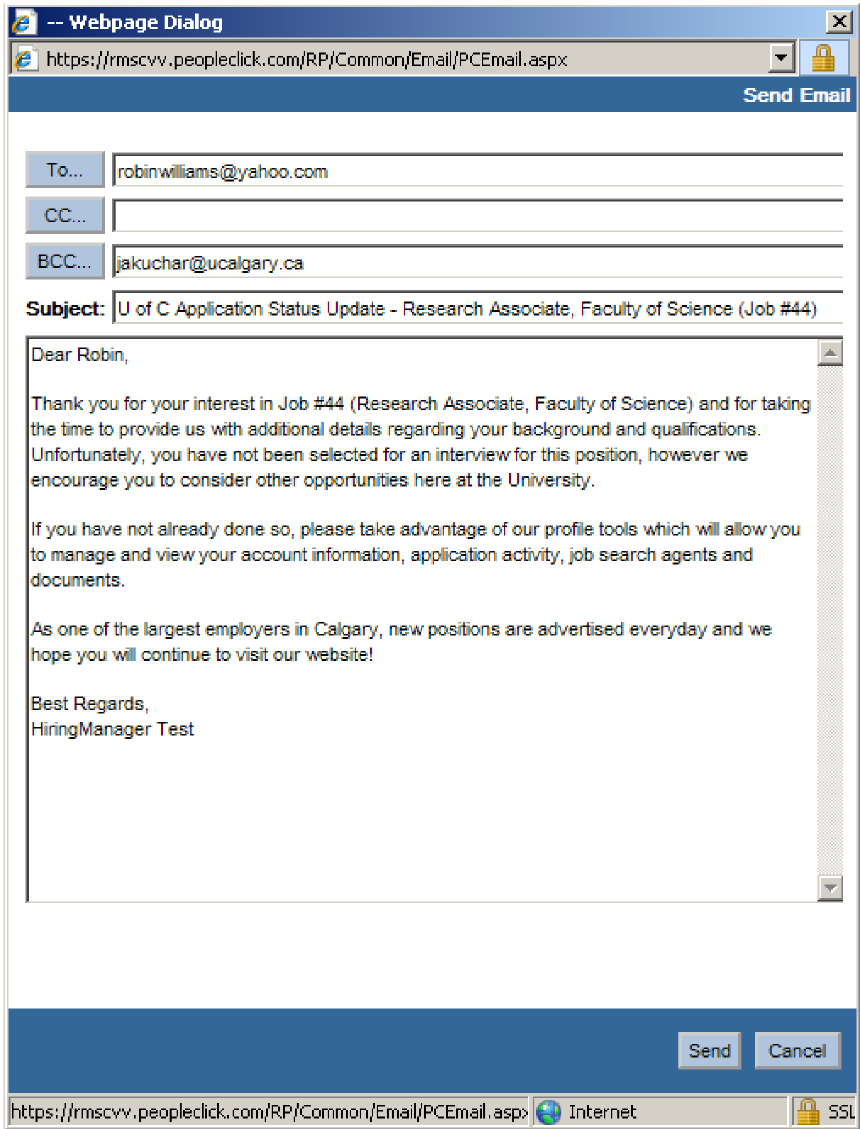
<table>
<tr><th>Workflow Folder</th><th>Folder Description</th></tr>
<tr><td>Sent to Manager</td><td>Candidates who have met minimum requirements and have been sent to the requisition contacts for review</td></tr>
<tr><td>Not Selected</td><td>
Candidates who have not been shortlisted for the position
Note: An email trigger will be generated containing a generic and editable decline email to the candidate(s). This email is sent from hrhire@ucalgary.ca


</td></tr>
<tr><td>Phone Screen</td><td>Candidates who have been selected for a phone screen</td></tr>
</table>

WORKFLOW FOLDERS AND TRIGGERS (CONTINUED)

<table>
<tr><td>Not Selected After Phone Screen</td><td>Candidates who were not selected after phone screen

Note: An email trigger will be generated containing an editable decline email to the candidate.

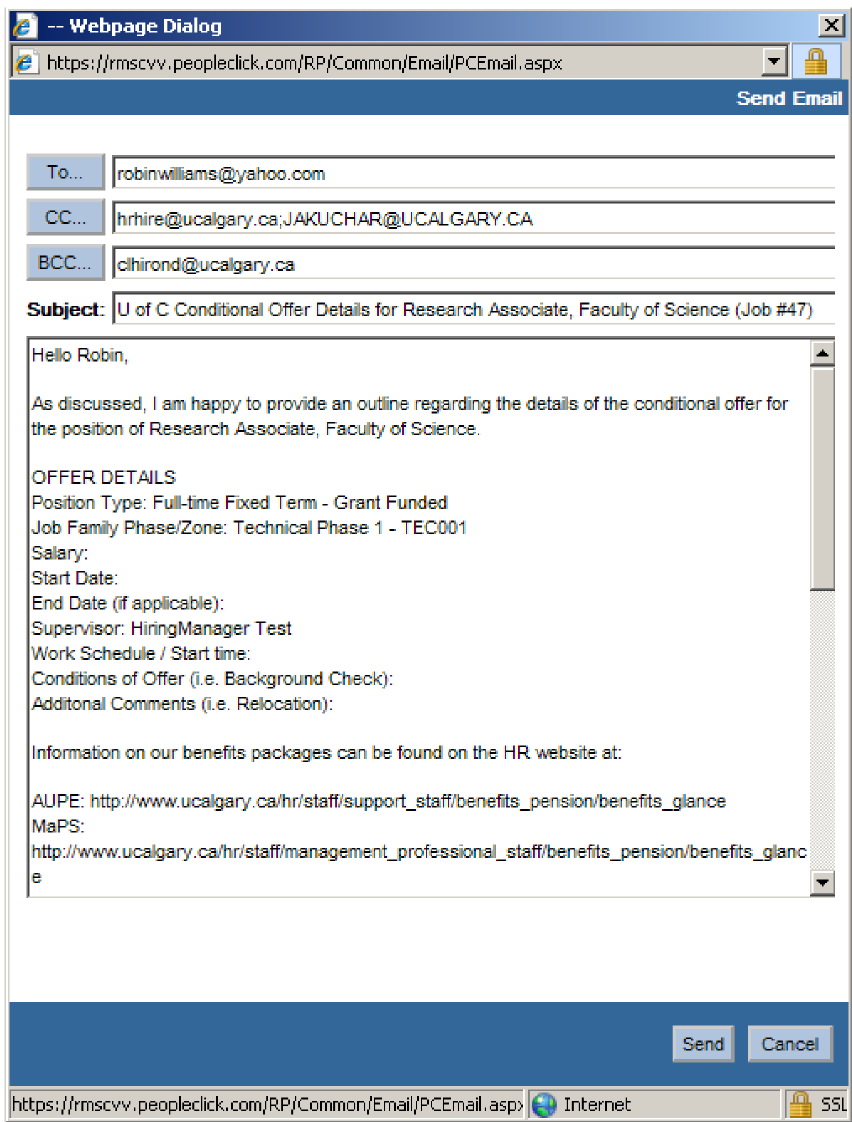

</td></tr>
<tr><td>Shortlist</td><td>Candidates who have been shortlisted</td></tr>
<tr><td>Interview</td><td>Candidates who have been selected for an interview</td></tr>
</table>

<table>
<tr>
<td>Not Selected After Interview</td>
<td>Candidates who have not been selected after interview

Note: A message trigger will appear with a reminder that candidates who have been brought in for an interview should be contacted via telephone to decline.


</td>
</tr>
<tr>
<td>Verbal Offer Extended</td>
<td>Successful candidate who has been extended a verbal offer.

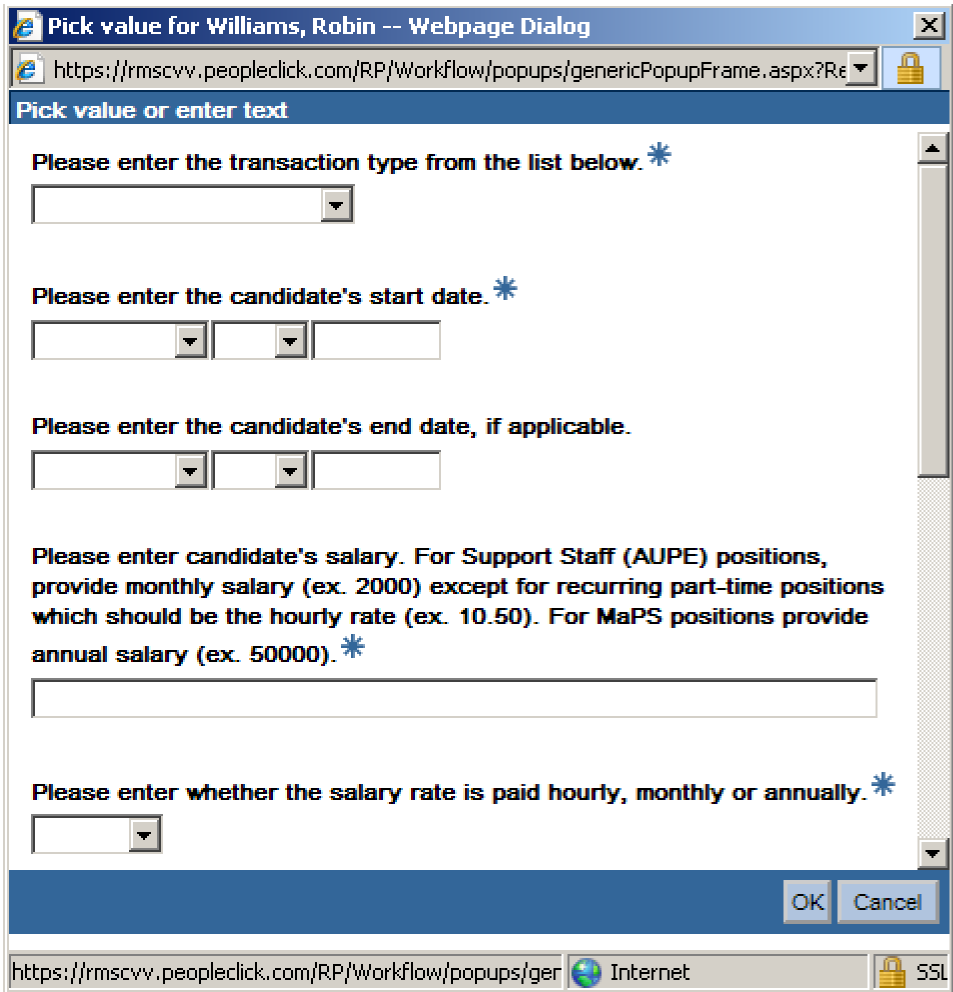
Note: An email trigger will be generated to outline conditional offer details. This should be sent to the candidate and is meant to be a confirmation of the verbal / conditional offer.


</td>
</tr>
</table>

WORKFLOW FOLDERS AND TRIGGERS (CONTINUED)

<table>
<tr><td>Offer Accepted</td><td>Verbal offer accepted

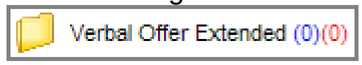
Note: A trigger will be generated to collect final offer details.



This information can be viewed on the candidate's 'Profile' page</td></tr>
<tr><td>Offer Declined</td><td>Verbal offer declined</td></tr>
<tr><td>Generate Hire Form for Recruitment</td><td>Once offer has been accepted, move candidate to the Generate Hire Form for Recruitment folder.

Note: A document trigger will generate the Hire Form which will be populated with both job and candidate details.</td></tr>
</table>

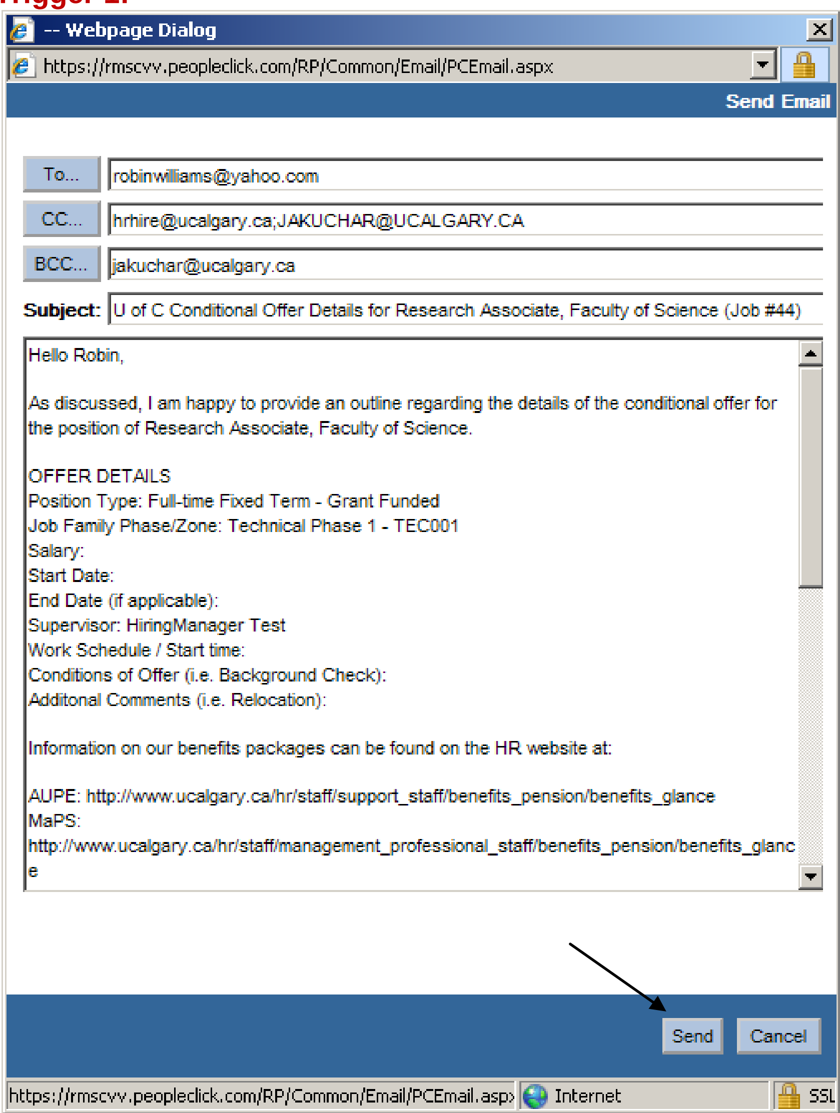
Workflow Steps in the Offer Process

1. Once the successful candidate has been determined, the candidate should be extended a verbal offer, and followed up by moving the candidate through the workflow to the **Verbal Offer Extended** folder in the Workflow frame. 

   An email trigger will appear **(Trigger 1)** containing offer details. This email should be sent to the successful candidate and copied to the HR Team and Hiring Managers as listed in Peopleclick (requisition contacts should automatically populate).

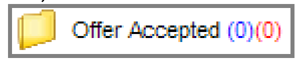
   Most information will automatically populate, however **Salary, Start Date, End Date (if applicable), Work Schedule / Start time, Conditions of Offer (if applicable)** and any **Additional Comments** will need to be entered.

   Trigger 1:



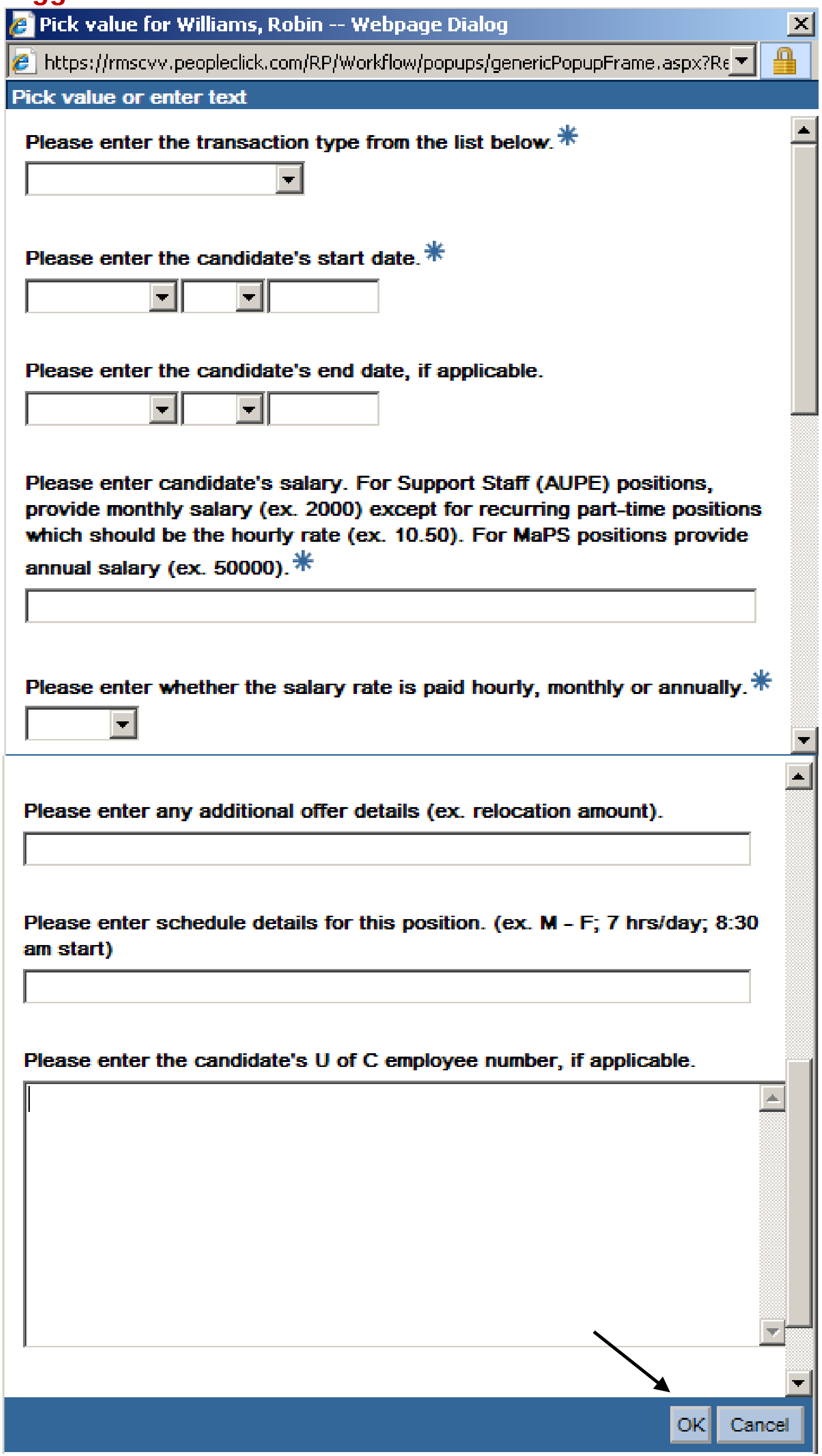
   Once offer details are complete, click .

Workflow Steps in the Offer Process (Continued)

2. Once the successful candidate has agreed to the terms of the verbal offer by verbally accepting or by replying to the 'Conditional Offer Details' email, the candidate should be moved to the **Offer Accepted** folder in the Workflow frame. 

   The following trigger will appear to collect final offer details **(Trigger 2)**.

Trigger 2



Workflow Steps in the Offer Process (Continued)

3. Enter the following candidate offer details into the **Offer Accepted** trigger:

Trigger Field	**Description**
Transaction Type	Please enter the transaction type from the drop down list.
Candidate's Start Date	Please enter the candidate's start date (e.g. their first actual day on the job).
Candidate's End Date	Please enter the candidate's end date, if applicable (ie. Temporary, Limited Term and Fixed Term positions)
Candidate's Salary (do not include $)	Please enter candidate's salary. For Support Staff (AUPE) positions, provide the monthly salary (ex. 2000) except for recurring part-time positions which should be the hourly rate (ex. 10.50). For MaPS positions provide the annual salary (ex. 50000).
Salary Schedule	Please enter whether the salary rate is paid hourly, monthly or annually.
Additional Offer Details	Please enter any additional offer details (ex. Relocation amount), notes for offer letter, etc.
Schedule Details	Please enter schedule details for this position. (ex. M – F; 7 hrs/day; 8:30 am start) ***Note:*** Recurring Part Time positions do not require a schedule
UCID	Please enter the candidate's UCID (employee id #) if applicable.
Employee Record	Please enter the employee record number to which this position applies, if applicable.

Once offer details are complete, click 

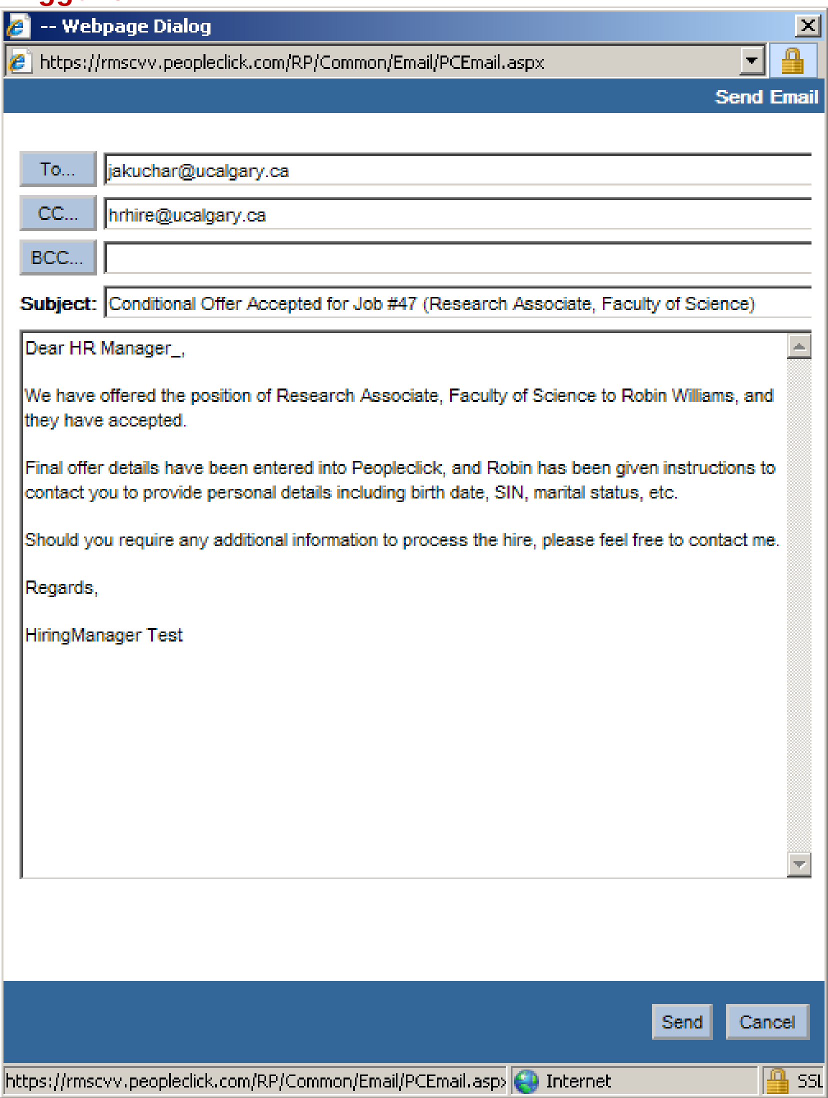
.

These details can be viewed on the Candidate's 'Profile' page

WORKFLOW STEPS IN THE OFFER PROCESS (CONTINUED)

An email trigger will appear **(Trigger 3)** containing offer details. This email is meant to be sent by the Hiring Lead to the primary recruiter (HR Service Team member) to confirm that the candidate has accepted the offer and inform them the candidate is ready for processing (requisition contacts should automatically populate).

Trigger 3

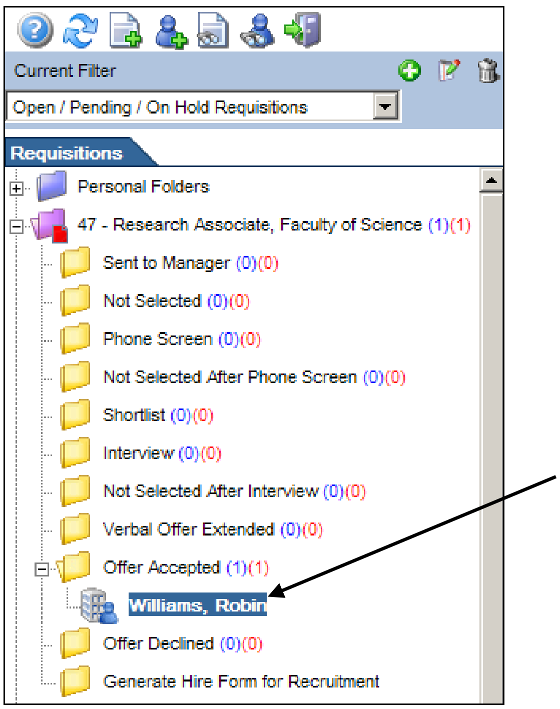


How to Edit Offer Information:

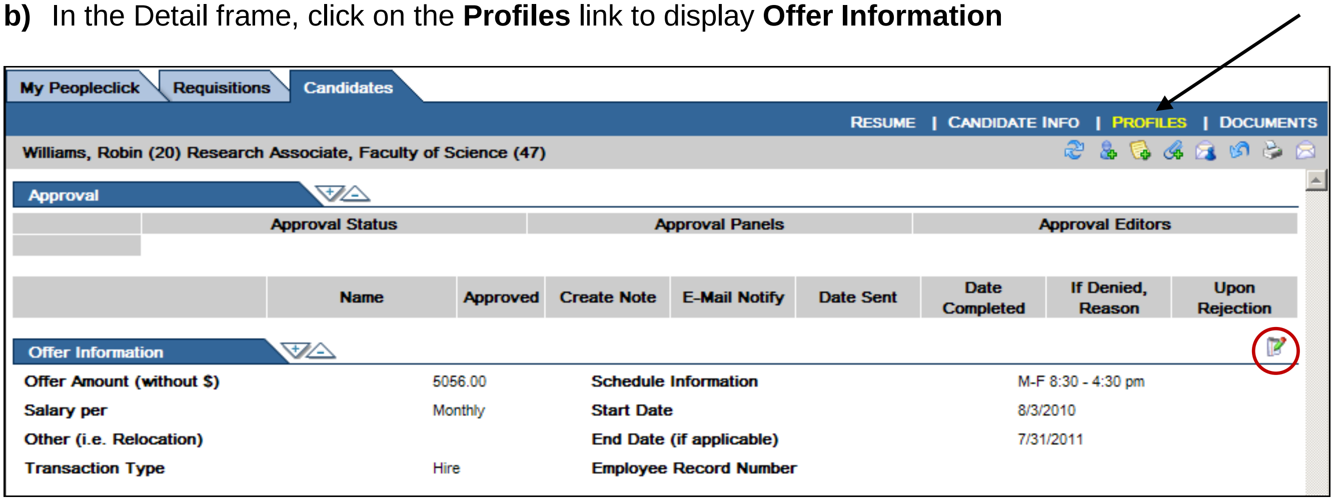
If you need to make any changes to the Offer Accepted information or Candidate Information after clicking OK on the Offer Accepted trigger, please navigate to the following pages in Peopleclick.

Changes to Offer Information:

a) In the Workflow frame, under the **Offer Accepted** folder, click on the successful candidate's name.

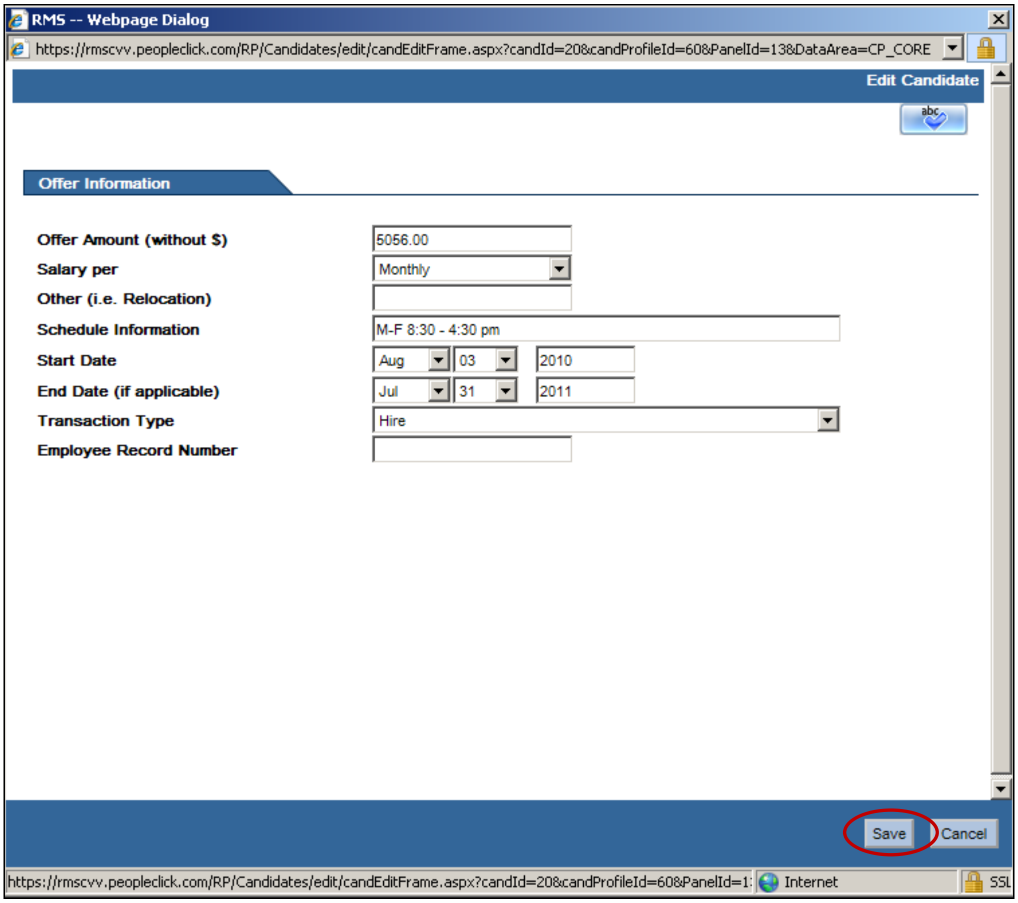


b) In the Detail frame, click on the **Profiles** link to display **Offer Information**



c) To make changes to the **Offer Information**, click the edit ( ) icon

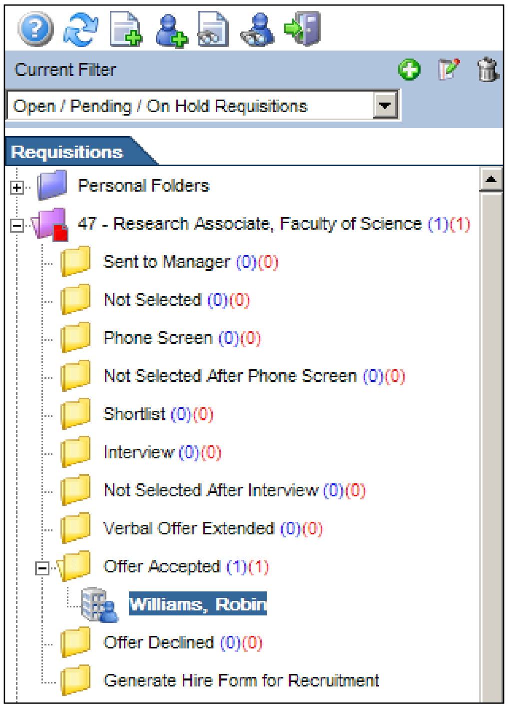
d) Edit the applicable offer details and click Save.



Workflow Steps in the Offer Process (Continued)

Changes to Candidate Information:

a) In the Workflow frame, under the **Offer Accepted** folder, click on the successful candidate's name



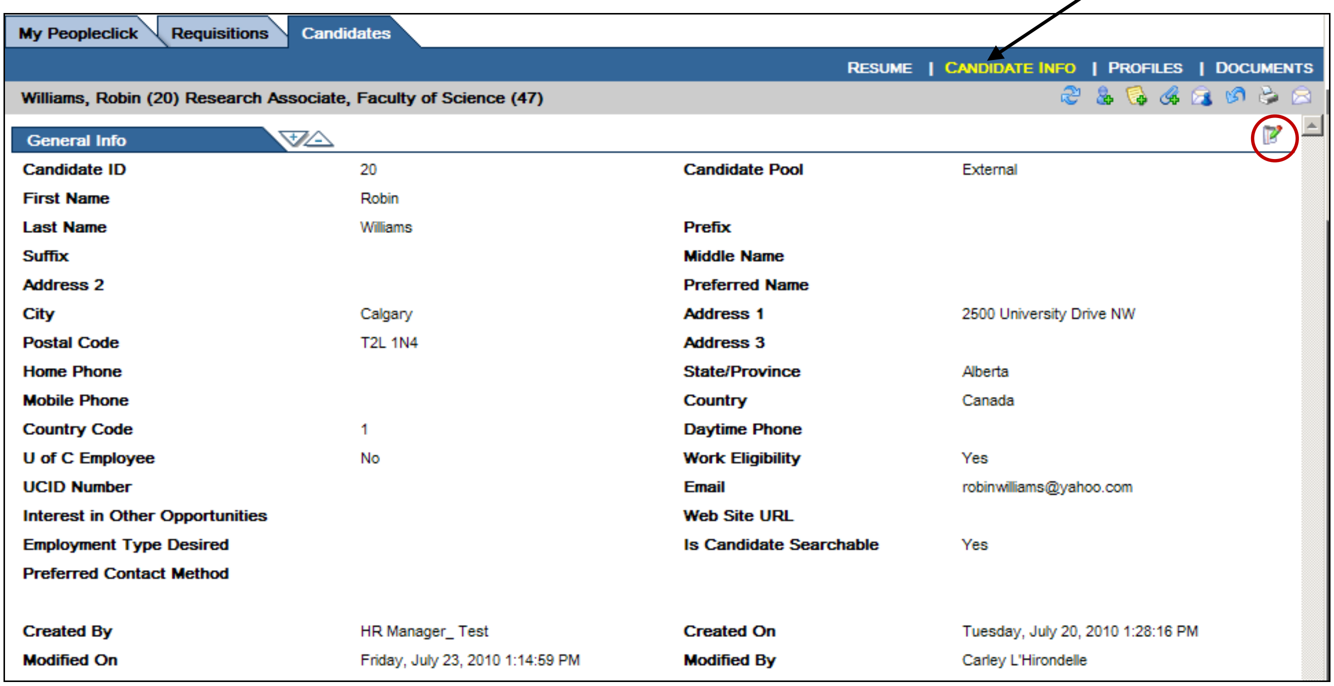
b) In the Detail frame, click on the **Candidate Info** link to display general candidate info

Under the **Candidate Info** section you may edit any of the following which will automatically populate into the Hire Form:

- First Name
- Last Name
- Address Information
- Contact Information
- Email
- UCID #

c) To make changes to the Candidate Info, click the edit ( ) icon.

d) Edit the applicable Candidate Info and click Save.



IMPORTANT NOTE:

You must notify your HR Service Team if any change is made to a candidate's offer information details, as a revised Hire form must be sent to hrhire@ucalgary.ca.

Icon Glossary

Global Toolbar Icons

These icons appear in the top left corner of the screen

- View the Recruiting Portal online help
- Refresh the display of Requisitions and Candidates in the Workflow Tree
- Requisition Quick Find
- Candidate Quick Find
- Log out of the Recruiting Portal

Requisition Icons

These icons appear next to the requisition in the Workflow Tree

(green)	Open Requisition
(green with blue thumb tack)	Open Requisition that is posted on the U of C Careers website
(purple)	Requisition pending approval
(yellow)	Closed Requisition
(blue)	Requisition that has been filled
(orange)	Requisition that has been cancelled
(red)	Requisition that has been rejected or sent back for corrections

Requisition Toolbar Icons

These icons appear in the top right corner of the Requisition tab

- Refresh the information shown for the current requisition
- Display all the candidates in the requisition in the Candidate List frame
- Add a note to the current requisition
- Attach a document to the current requisition
- Print the current requisition

Right-Click Requisition Icons

These icons appear when you right click a requisition in the Workflow Tree

- Display the number of candidates in each workflow folder
- Display all the candidates in the requisitions in the Candidate List
- Quickly find a requisition
- Collapse the Workflow Tree

ICON GLOSSARY (CONTINUED)

Right-Click Workflow Folder Icons
These icons appear when you right click a Workflow folder in the Workflow Tree

 Quickly find a requisition

 Collapse the Workflow Tree

Candidate Indicators
These are the icons that appear next to a candidate's name in the Workflow Tree and the Candidate List

 External Candidate

 Internal Candidate

 Referred Candidate

Candidate Toolbar Icons
These icons appear in the top right corner of the Candidates tab

 Refresh the information shown for the current candidate

 Add a note to the current candidate

 Attach a document to the current candidate

 Send an email message to the current candidate

 Undo the last candidate move

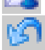
 Print the current candidate's information

 Forward the current candidate's resume

Right-Click Candidate Icons
These icons appear when you right click a candidate in the Workflow Tree

 Collapse the Workflow Tree

 Send an email message to the current candidate

 Undo the last candidate move